

COVID-19's Consumer Impact Report

1st Edition - April 2020



WHAT'S INSIDE

The **Canadian consumers attention** has shifted, although more present than ever before.

Brands are responding, allowing for short-term and long-term growth in market share.

How these trends in consumer behavior are creating **unique opportunities** for brands.

DIGITAL MEDIA CONSUMPTION

DIGITAL MEDIA CONSUMPTION HAS GROWN AND STABILIZED AS WE ADJUST TO NEW REALITIES

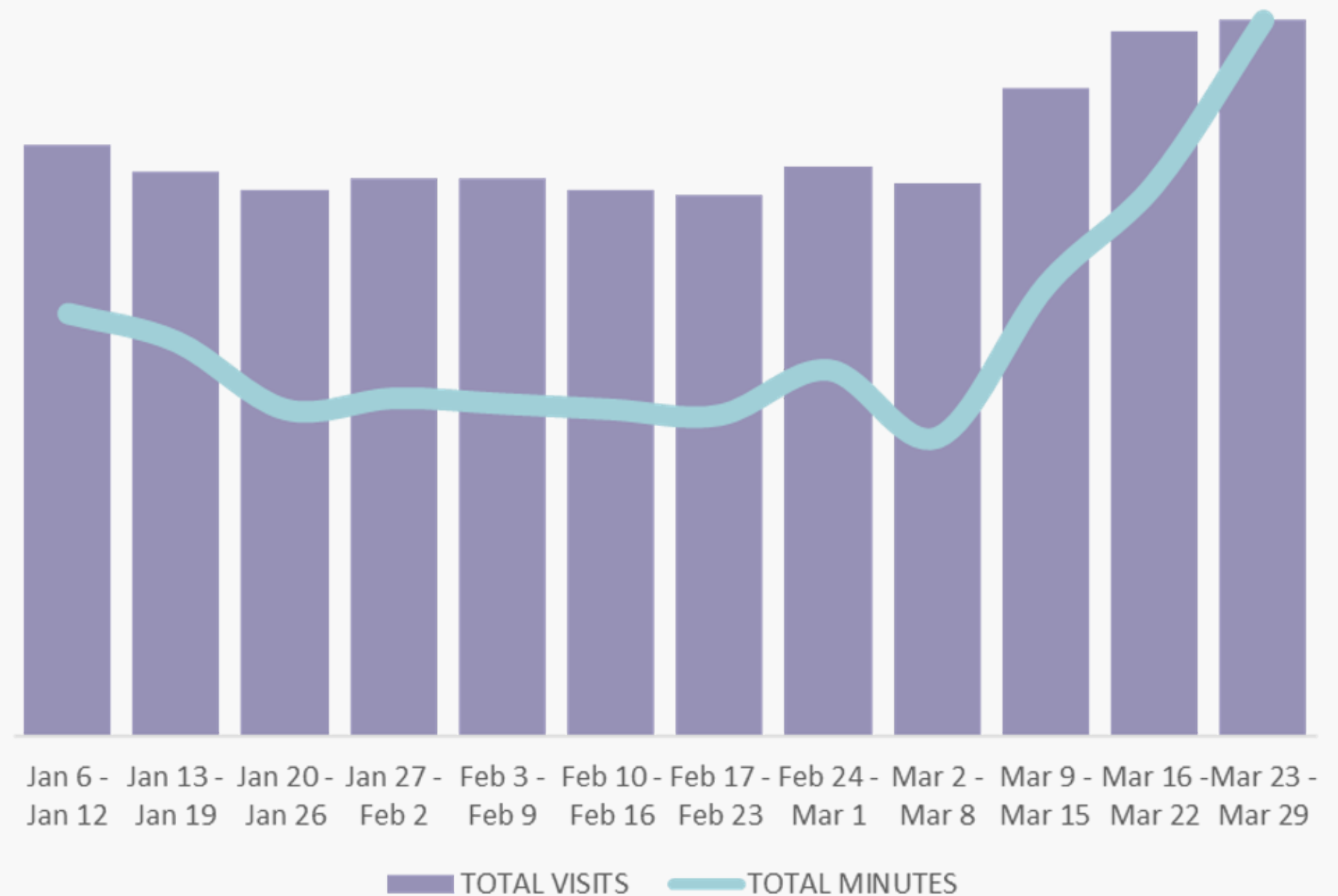
As Canadians transitioned to working from home, we saw a massive spike in online media consumption. Although stabilization is now here, we are seeing some notable trends across certain verticals.



NEWS & INFORMATION

CANADIANS ARE FLOCKING TO NEWS AND INFORMATION SITES TO FIND VALUABLE CONTENT SURROUNDING COVID-19.

Across the board, this category has seen a significant increase in Unique Visitors, Visits, and Minutes as the impact of COVID-19 increased across the country. Although the growth in usage has begun to plateau, we anticipate continued attention to news & information sites creating an opportunity for marketers to reach Canadians during this engaging moment in history.





CANADIANS GET SOCIAL

AS WE COLLECTIVELY SOCIAL DISTANCE, WE GRAVITATE TOWARDS DIGITAL FORMATS TO KEEP SOCIAL

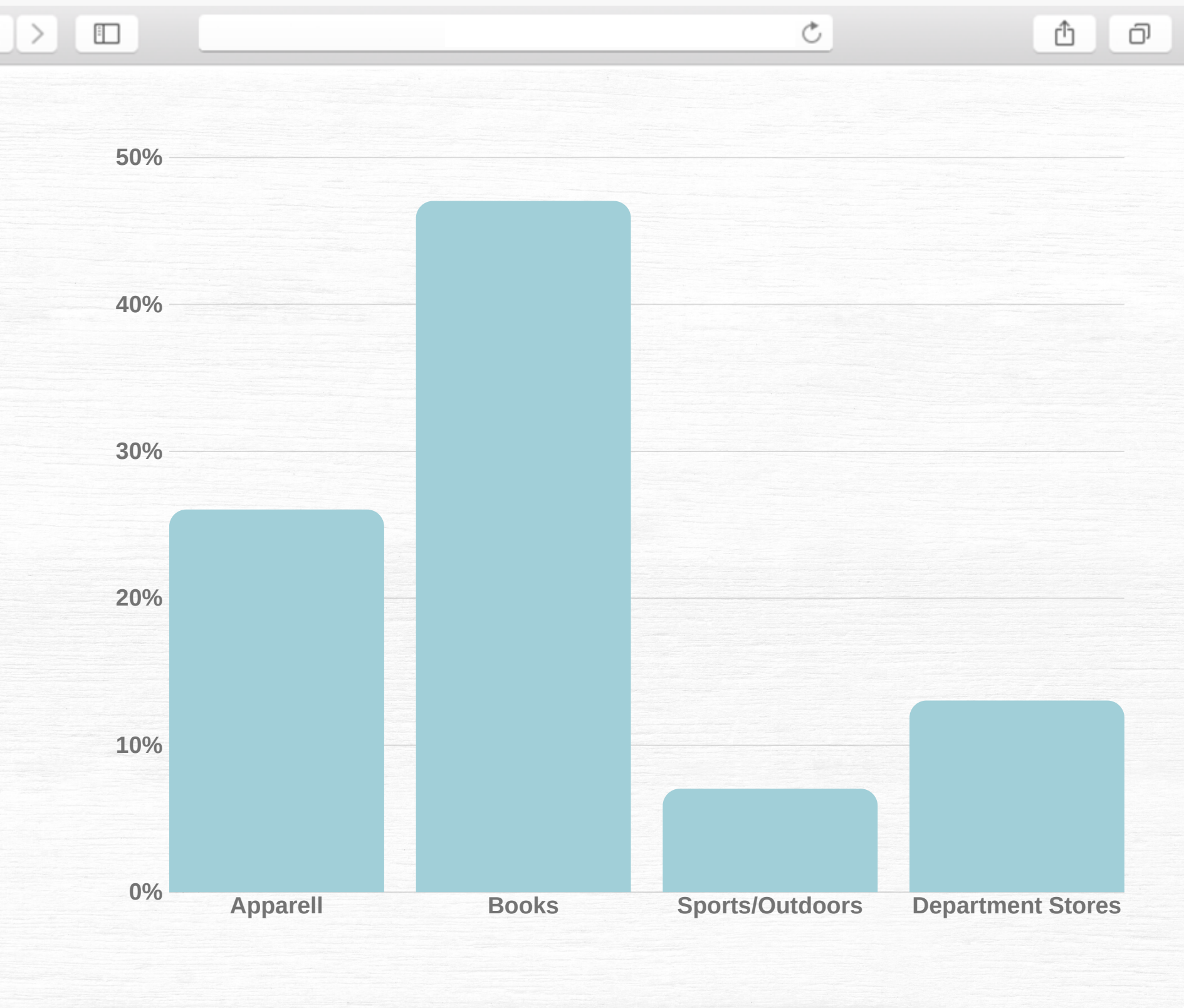
Canadians consumption of social media has grown rapidly. While the user growth increases the relative ad costs has declined creating a unique opportunity for advertisers.

BROADCAST CONTINUES TO GROW

LINEAR AND DIGITAL TV FORMATS SPIKE IN USAGE

73% of Canadians are tuning to their TV to avoid news content. Digital TV consumption has risen by more than 24% in the US/UK during the COVID-19 crisis, creating opportunities for traditional and addressable TV advertising options.





RETAIL CONSUMPTION IS SHIFTING

DIGITAL MEDIA CONSUMPTION WITHIN RETAIL CATEGORIES GROWS

Overall retail category minutes viewed has grown by 12%, showing that Canadians shopping patterns are adapting to an online centric environment.

Weekly Comparison - Mar 16, 2020 vs. Mar 23, 2020



"With many Canadians now working from home, TV viewing is up 17% overall with increases being driven by daytime viewing. Monday to Friday daytime viewing is 56% above benchmark driven by conventional and specialty daytime news. For advertisers who traditionally focused on costly prime time TV buys, daytime television becomes a more cost effective method to reach consumers within credible programming."

-Stephanie Dunn





Marketing sits center stage, its moves reflected in every ad campaign, message and channel.

You set the tone for how customers perceive the brand during difficult a time.

-Gartner



ADAPTING THE MARKETING PLAN

OVER THE NEXT SIX MONTHS, MARKETING PLANS WILL ADAPT

Restrictions on large gatherings are forcing brands to pivot, developing alternative plans for physical events planned for the spring and summer months.

Securing media early will be key, as advertising options may become limited for those who delay.

ACTION PLAYBOOK

Adapt Messaging & Placements

Rapidly adapt messaging and placements as the pandemic's impact evolves. Consumer attention is shifting, be present where your audience is.

Define Scenarios

Closely monitor consumer trends in media consumption and brand responses, building multiple scenarios for your brands unique response. Speed wins.

Be Empathetic & Transparent

Canadians have been impacted, no matter who they are. Showcase humility in your brand as your customers are feeling vulnerable.

Align your Brand with the Good

People will not forget the brands who step up during this time. An act of good in a crisis will capture the attention of Canadians, which will have a long-term impact.

Keep Delivering

Canadians have quickly adapted to adjusted working arrangements. Consumer demand continues for a wide variety of products. Market share gains can be had.

OPERATIONS PIVOT TO SUPPORT DEMAND

OPPORTUNITIES ARE BEING ADDRESSED BY BRANDS DEVELOPING AND MANUFACTURING PPE

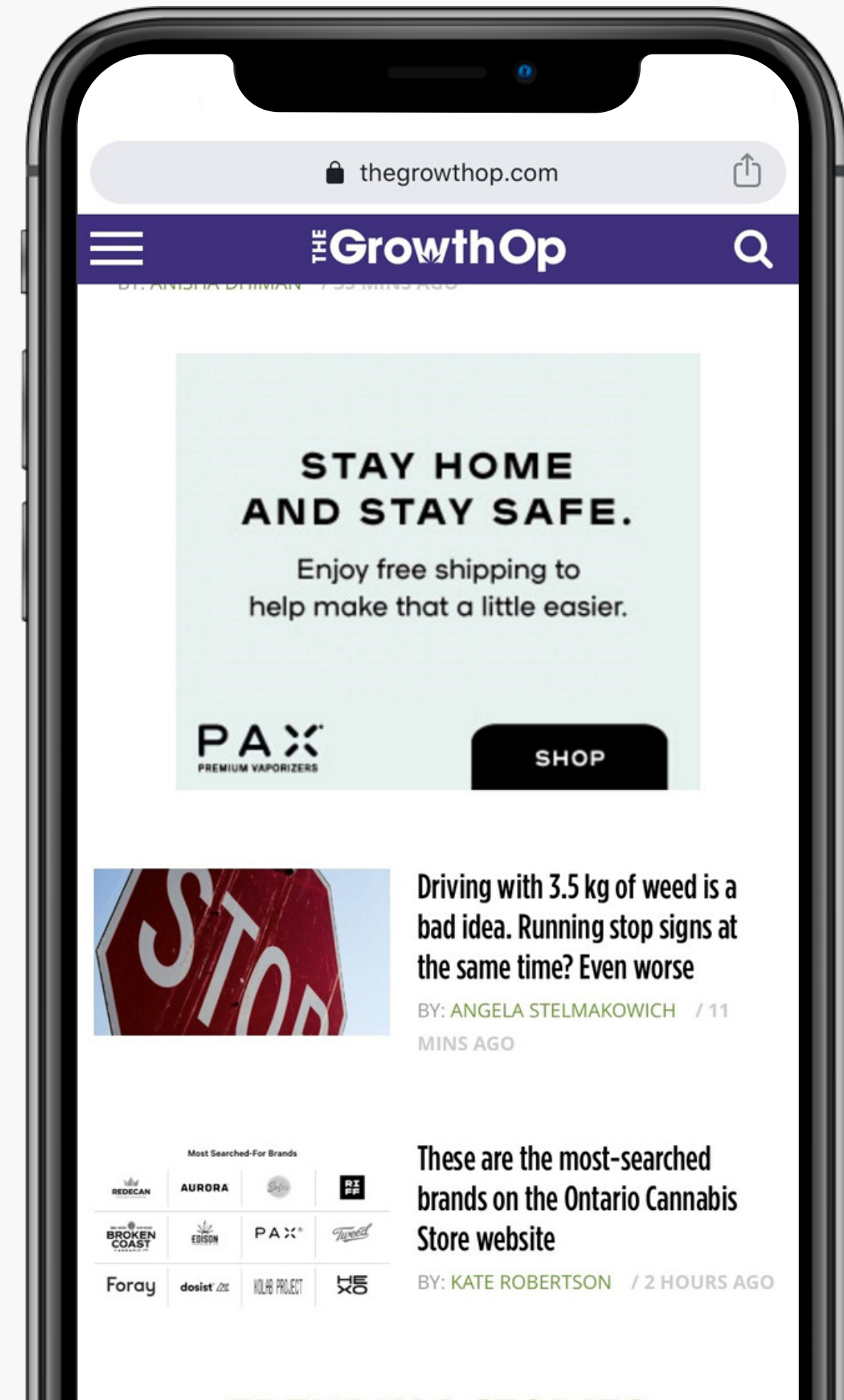
Organizations such as Stanfield's, an undergarment manufacturer have adjusted operations to produce PPE. While a move to support the immediate needs, a shift that will build massive brand sentiment over time.



BRANDS ARE RESHAPING THEIR MESSAGES

BRANDS ARE RAPIDLY RETHINKING THEIR MARKET POSITIONING

While there are plenty of brands that are struggling, there are others emerging as leaders within these chaotic times. Brands who are speaking the needs of Canadian consumers.





Finding the way forward: Guiding businesses through coronavirus (COVID-19)

Discuss the impacts of coronavirus with one of our experts

We are committed to helping our clients, colleagues and communities, as we all try to navigate the impacts of COVID-19.

Where to go for information

- [World Health Organization](#)
- [Canadian Government – Public Health](#)

BRANDS MOVE TO SUPPORT CLIENTS

ORGANIZATIONS HAVE MOBILIZED TO PROVIDE COVID-19 RELATED INFORMATION

A massive push for COVID-19 related content by Canadians has been addressed by brands who have rapidly mobilized to provide valuable resources.



The situation for each brand is changing at an incredible pace and organizations have adapted quickly. As the dust settles, resist the urge to pinpoint a date for a future change of course. Instead, identify metrics that are strong indicators of your consumers' likely behaviour, and use them as triggers for any future campaign changes. Build plans built on a future state, rather than a future time, so you're ready to enact plans when it's appropriate and the conditions warrant it.

-Clare Tidby



UNIQUE OPPORTUNITIES

Broadcast

New opportunities are now present to reach audiences outside of the traditional time slots. Canadians are now consuming Monday to Sunday, throughout the day.

Maintain Visibility

Brands who remain visible through these times will have an opportunity to gain valuable market share as we progress through and out of the pandemic.

Social Media

The value of social media as a paid media channel has been present for many years. Now with a noticeable reduction in costs, brands can further leverage investments to win in this environment.

Market Awareness

Keep your eye on the market and adjust creative messaging to support the current environment. Should we see a shift, be prepared to rapidly iterate.

Create Brand Advocates

Showcase your social good during the pandemic, support the global and local community. Consumers will reward your brand.



"The world has changed, and the future is filled with uncertainty and fear for people. Brands that acknowledge this by adapting their messages to provide comfort and leadership will continue to build brand equity over the long term. Historical evidence has proven that investing in long term equity is a sound strategy for Brands in times of economic downturn. Now is the time to gut test your marketing plans to ensure that they are still relevant. Now is the time to be the brand leaders that your consumers are seeking and to demonstrate your loyalty to your stakeholders."

-Donna Alteen





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