



GERMANY CLIMBS OUT

MINDSHARE

PERSPECTIVE FOR BRANDS

_____ CW 18 _____

AGENDA

01

FINDING OUR
WAY OUT

02

A LOOK
TO THE EAST

03

DIGITAL AD
DEVELOPMENTS

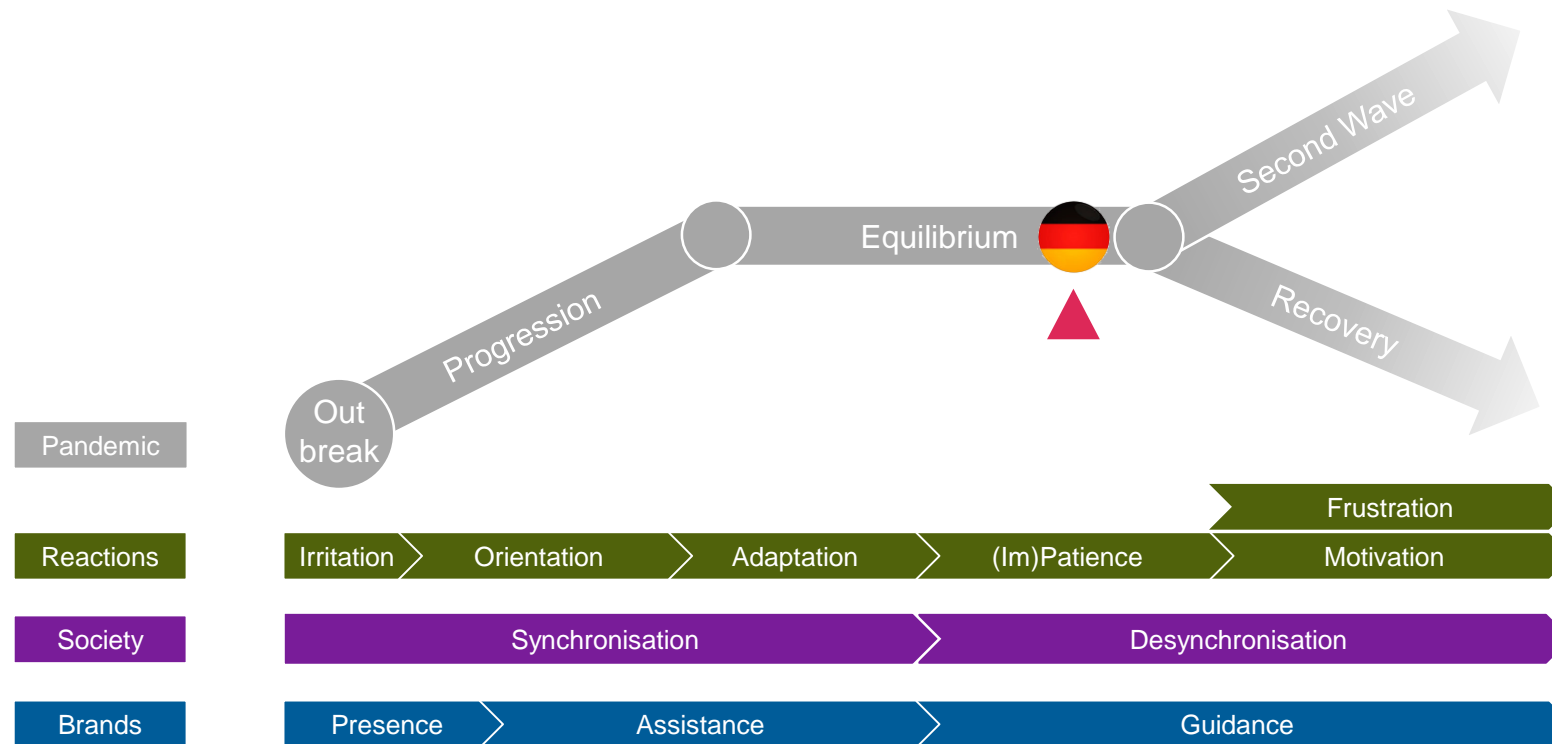


#1

FINDING OUR WAY OUT

BRANDS CAN GIVE GUIDANCE IN THE CURRENT SITUATION

PANDEMIC PHASES AND REACTIONS



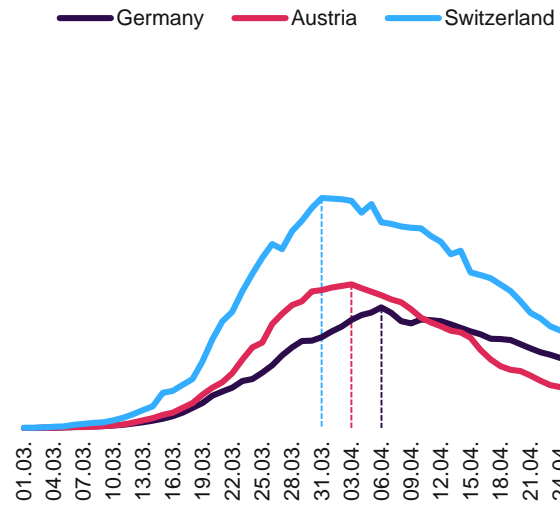
Merkel zu Corona-Lockerungen
Keine "Öffnungsdiskussionsorgien"
 Stand: 20.04.2020 13:54 Uhr

Reopening dispute

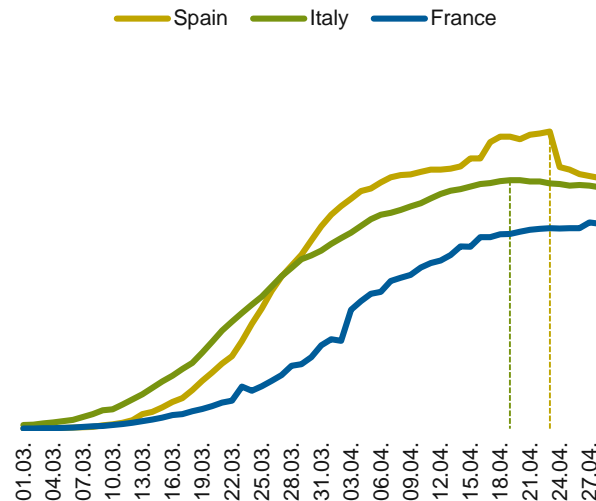
COUNTRIES ARE IN DIFFERENT PHASES OF THE PANDEMIC

GERMANY IS ON A FRAGILE WAY OUT

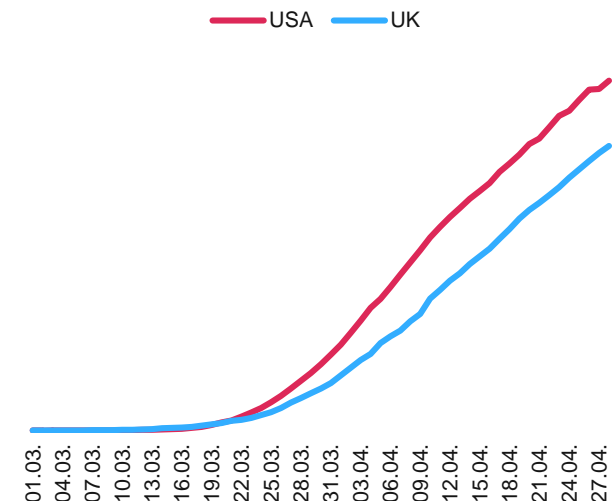
RECOVERY



REACHING THE PEAK



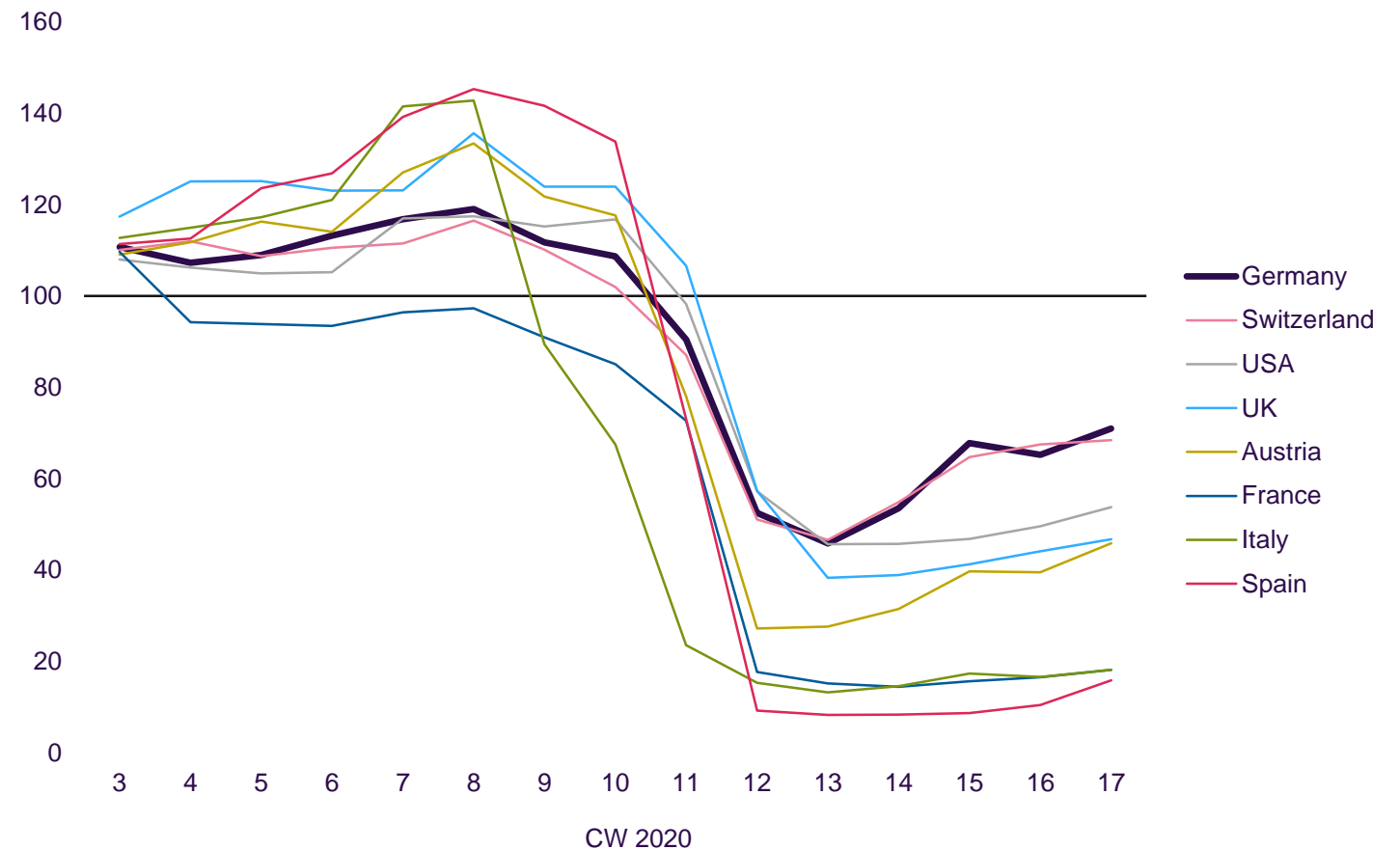
PROGRESSION



GERMANY STANDS AT THE FOREFRONT OF PRE-LOCKDOWN MOVEMENTS

Trend Mobility data sourced from the Apple Maps tool: Transportation type **Walking**

- After hitting a low point in cw 13 (March 23-29, week after announcement of lockdown) people in Germany are slowly getting out of their houses again
- The data also show the earlier lockdown for Italy, as well as the prolonged lockdown in markets such as Italy, Spain & France

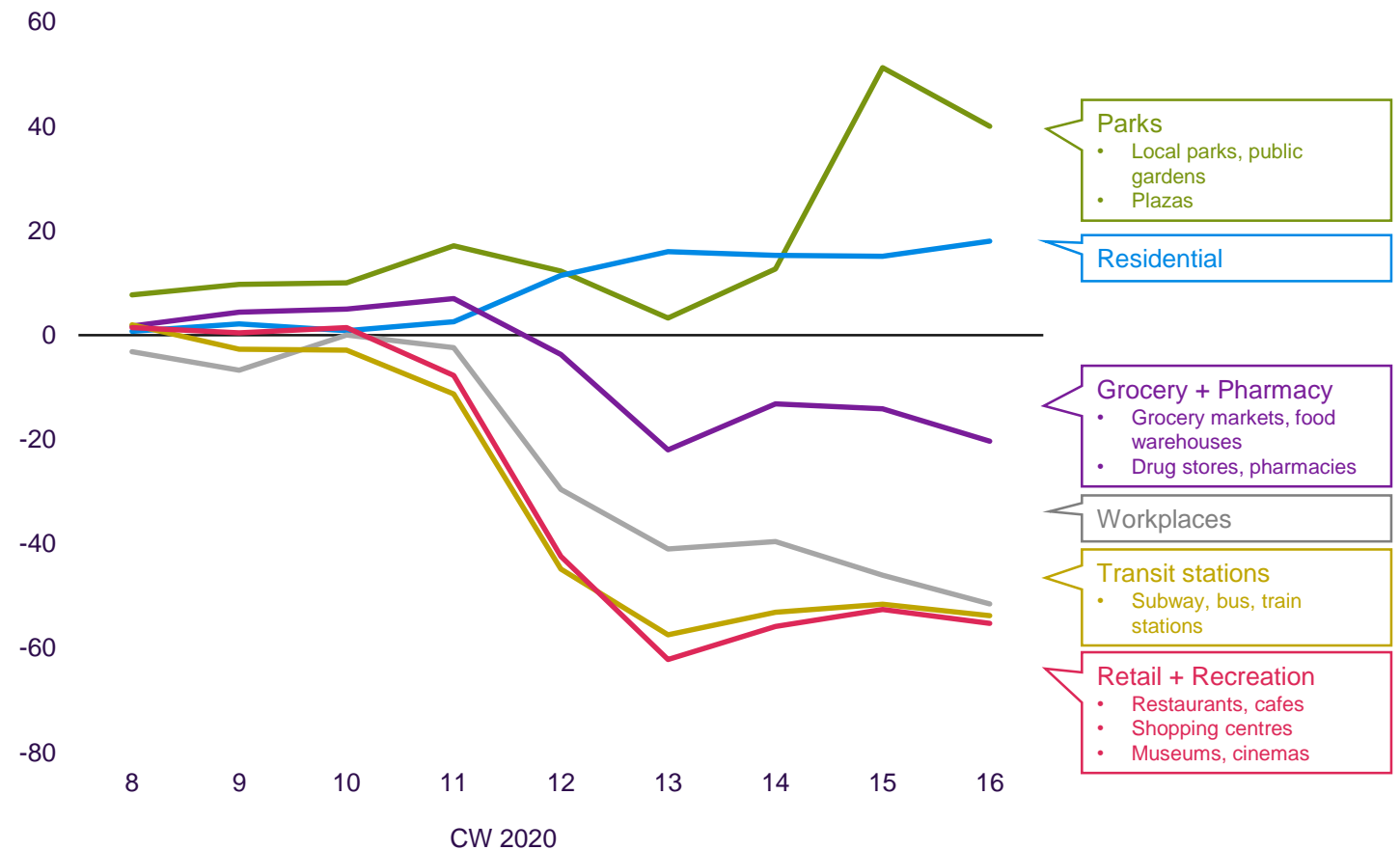


Source: Apple Mobility Data, 2020, relative volume of directions requests compared to baseline volume on January 13th, 2020

PARKS SHOW HIGHEST GROWTH AS OOH DESTINATION

CW 13 WAS THE FIRST RESET POINT BACK TO FREEDOM

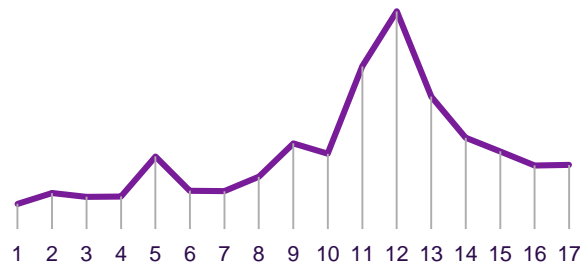
- Mobility data sourced from the Google show visits of different locations
- CW 13 (March 23-29) showed lowest values for Retail+Recreation, Transit and Parks
- Nevertheless there is a constant trend to stay at home and less at work



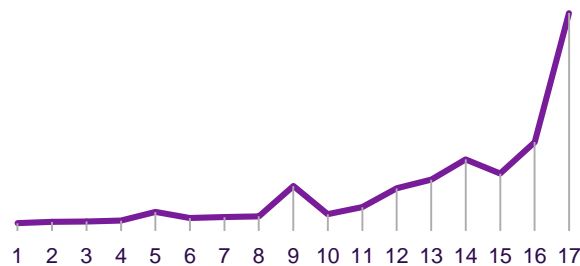
WE LEARN TO LIVE WITH THE VIRUS AND KEEP CALM

LIVING WITH THE VIRUS

Infektion (infection)

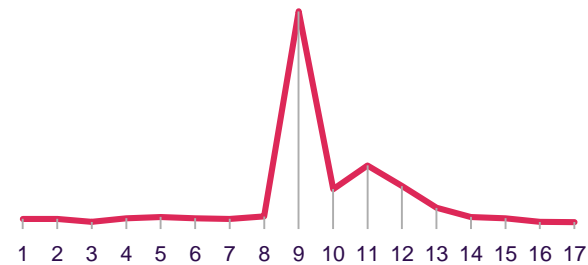


Maske (mask)

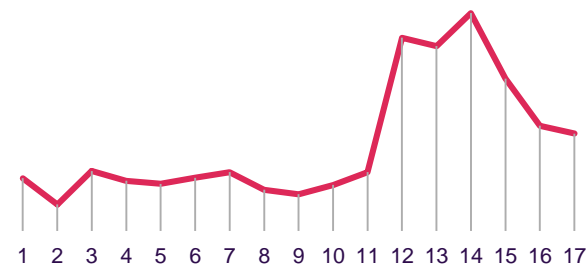


NO MORE PANIC

Vorrat (stock)

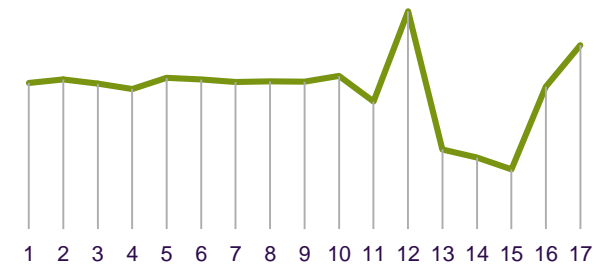


Lieferdienst (delivery service)

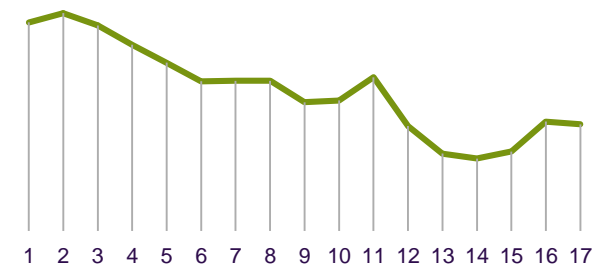


COMEBACK OF NORMAL

Friseur (hairdresser)



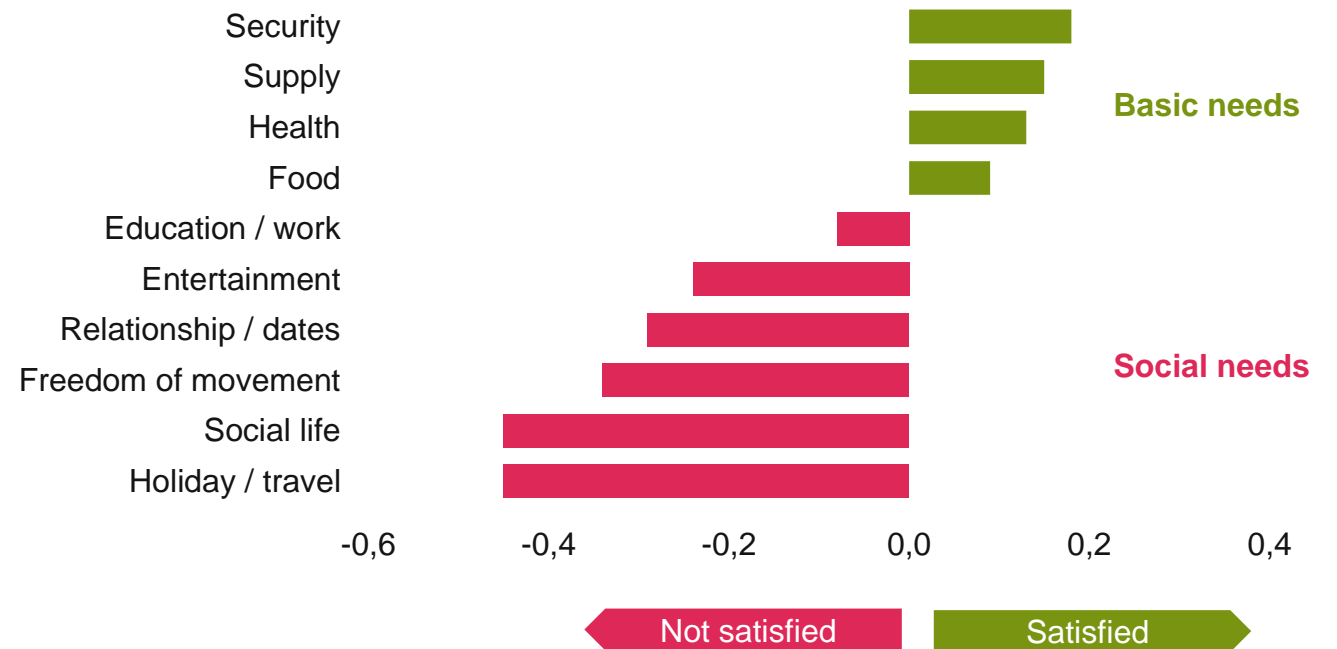
Urlaub (holiday)



PEOPLE BECOME IMPATIENT ABOUT THEIR SOCIAL LIFE AND FREEDOM OF MOVEMENT

Satisfaction with areas of life

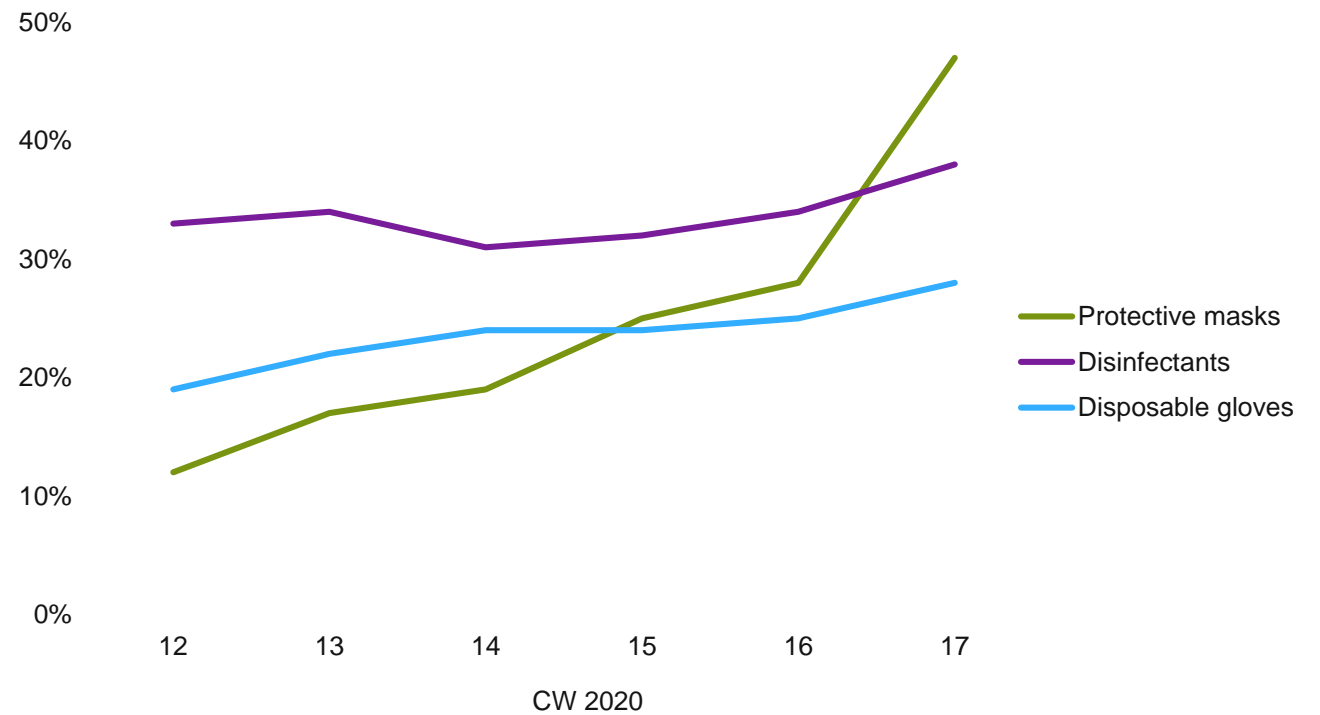
Change in mean values cw 17 (April 20-26)
versus cw 12 (March 16-22) of 6 pt. scale
(1 = not all satisfied, 6 = totally satisfied)



DO WE SEE THE RISE OF NEW ACCESSORIES?

Protective equipment which is bought more

Top-2 of 6 pt. scale: Significantly bought more

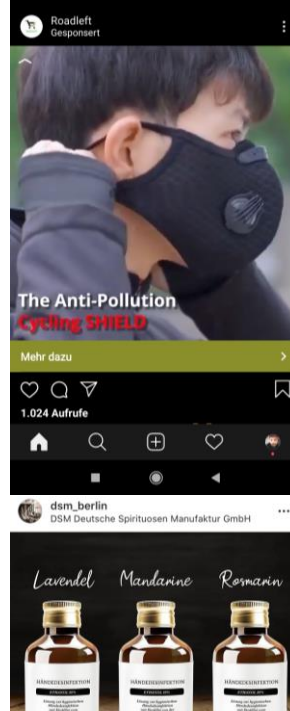


Source: Appinio CoronaReport Welle 6, adults 16-65, own calculations

FOLLOW THE BEHAVIOUR 'MASKS GO FASHION'

- From hay fever/ covid to fashion trend
- After shown on the Mercedes fashion week or presented by German TV moderator the fashion platform ABOUTYOU is offering a huge variety of masks
- On Instagram social ads with no FC seem to flood the consumer

Source:



BASIC



IDOLS



Verfügbar ab Mai

PRINTS



Verfügbar ab Mai

MARKEN



Verfügbar ab Mai



PRESSURE ON THE PIPE

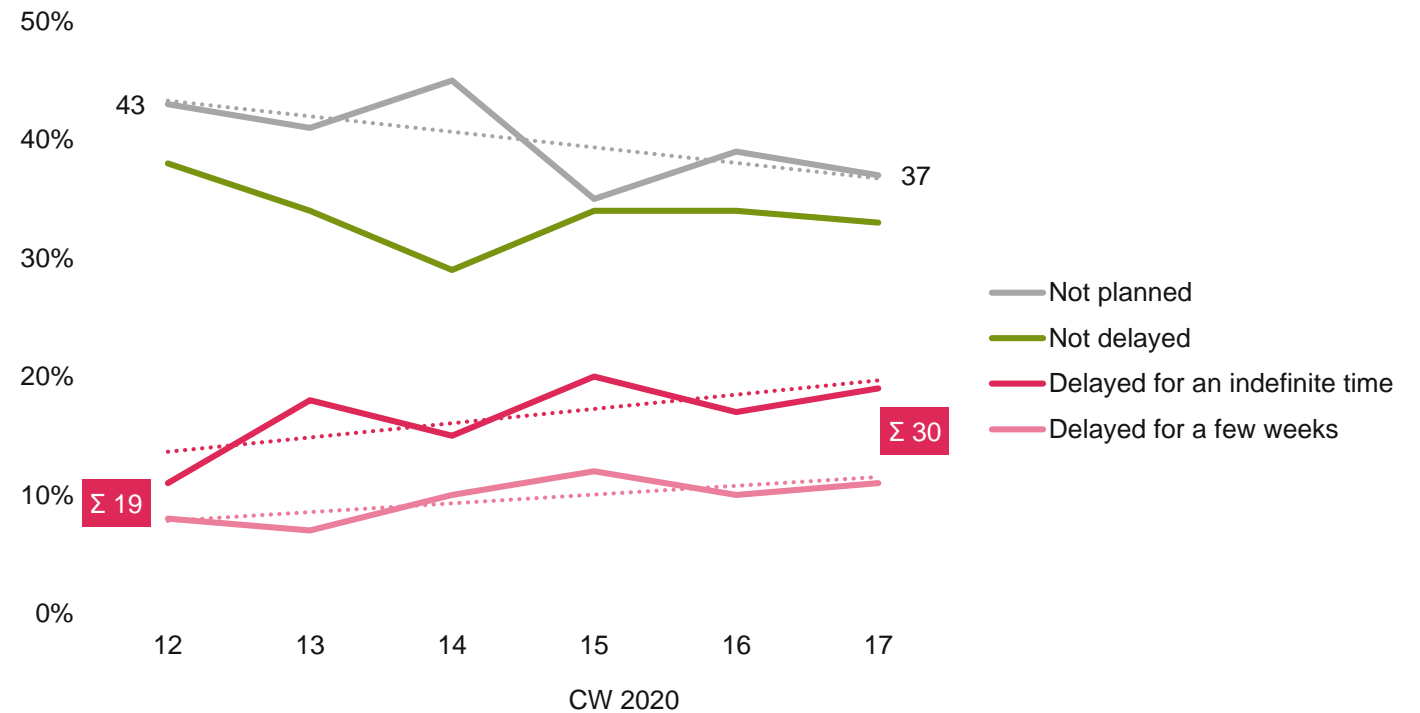
MORE AND MORE PEOPLE HAVE PLANS FOR MAJOR PURCHASES

Delay of major purchases

The number of consumers who do not plan any major purchase is in decline

The majority does not delay major purchases

But one in three consumers does delay major purchases



AS WE ARE ALL INCHING BACK TO NORMAL

GERMANY IS ONE OF THE EARLY MARKETS TO OPEN AGAIN

**SOCIETY BACK IN MOVEMENT
AFTER LOCKDOWN**

People in Germany are slowly increasing their mobility again through driving & walking, though public transport is likely to stay behind



BRAND OPPORTUNITY

OOH advertising in key city hotspots will come back as valuable touchpoints

**PEOPLE ARE KEEN TO GET
OUT OF THE HOUSE**

Visits to parks is far above normal level
Visits to grocery stores, public transport and recreation have reached the bottom line and begin to increase again



BRAND OPPORTUNITY

People will slowly find their way back to physical stores and look out for promotions

**MAJOR PURCHASES WAIT
FOR REALISATION**

While buying behavior for day-to-day goods returns to normal, major purchases are delayed until there is more visibility about future developments



BRAND OPPORTUNITY

Give consumers a perspective how to put major purchases into practice



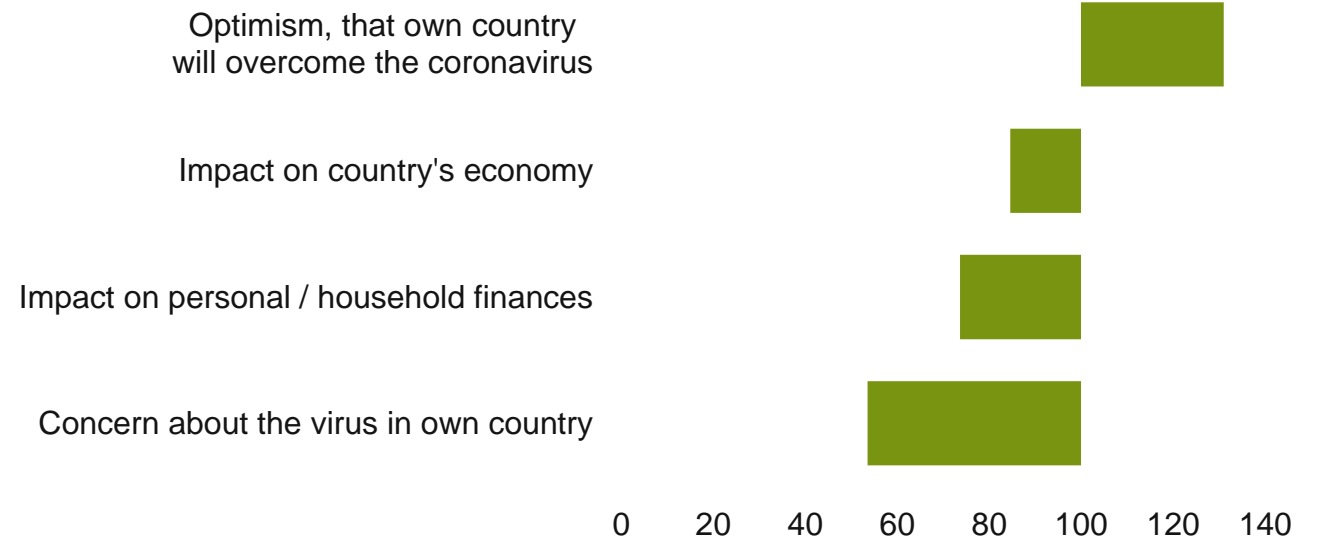
#2

A LOOK TO THE EAST

OPTIMISM HAS COME BACK

CHINA AT THE EXIT OF THE PANDEMIC

China: Index versus world (17 countries)



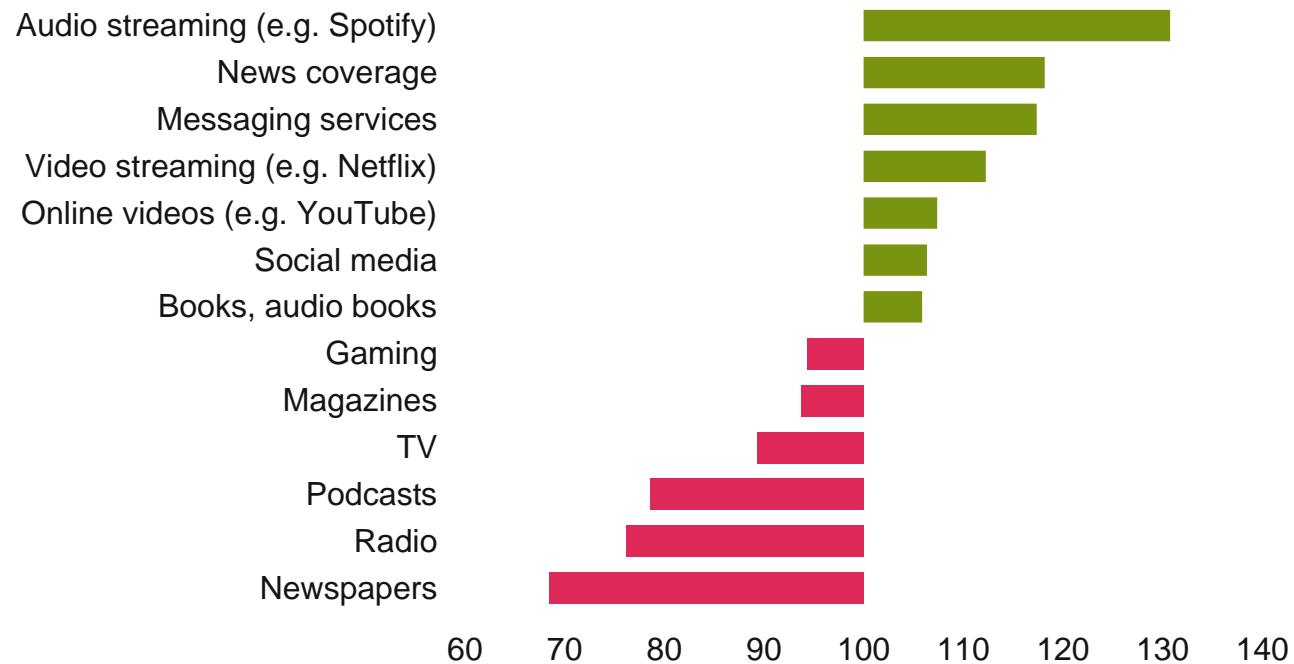
NETFLIX

TRADITIONAL MEDIA HAD ITS SHORT FLUTTER UP

China: Index versus world (17 countries)

**Media consumption because of the
coronavirus**

**Digital media consumption remains high,
whereas traditional media go back to
normal**



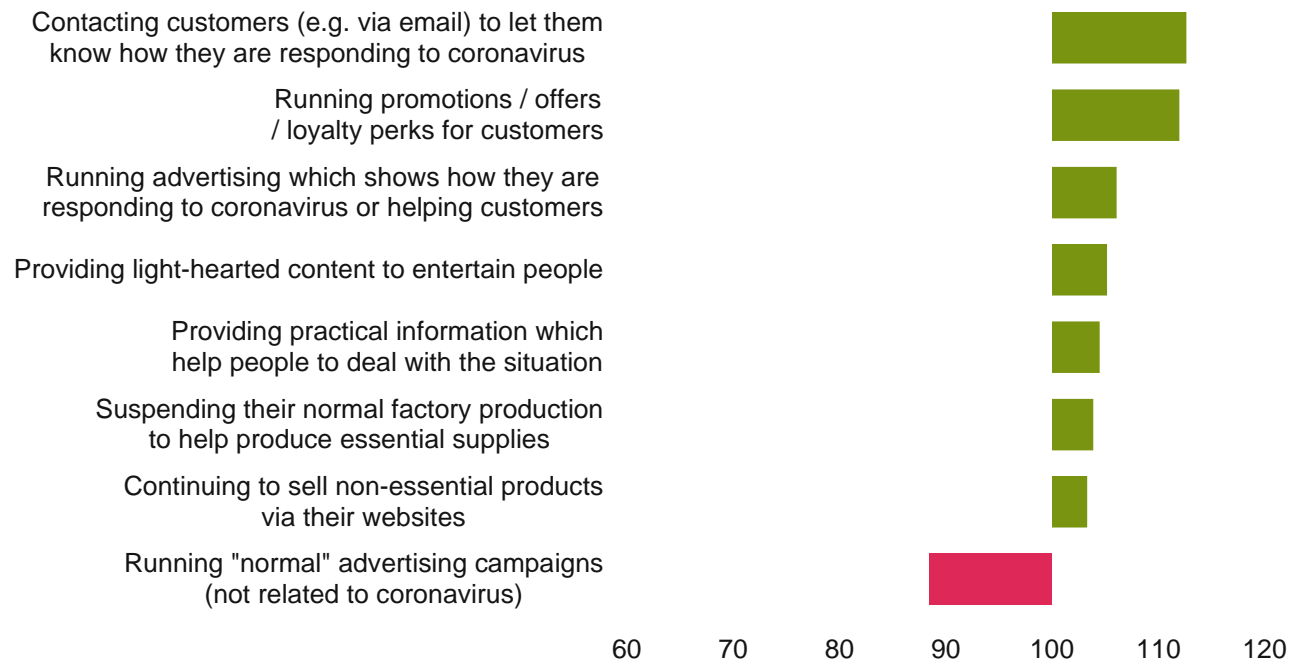
DON'T BE NORMAL

BE UP TO DATE AROUND THE TOPIC

China: Index versus world (17 countries)

Approval of brand actions

Brand actions should still reflect the Corona situation, but content can also be more light-hearted



GUIDANCE AND LIGHT-HEARTED CONTENT

CHINESE ADVERTISING DURING REOPENING PHASE

Brand: Netease Yeation

Category: Ecommerce & Lifestyle

Channel: OOH

Message: *We want you to see this ad, but it is more important that you stay at home*



THE WAY OUT OF THE CRISIS

LEARNINGS FROM CHINA

NEW OPTIMISM

Optimism to overcome the coronavirus
and economy's recession

Need for advice for own financial situation



SHIFT IN MEDIA CONSUMPTION

Audio and video streaming remain on a high level

Ongoing news coverage

Social and traditional media swing back to normal



APPROVAL OF BRAND ACTIONS

Brand actions should still reflect the corona crisis
and give guidance to consumers

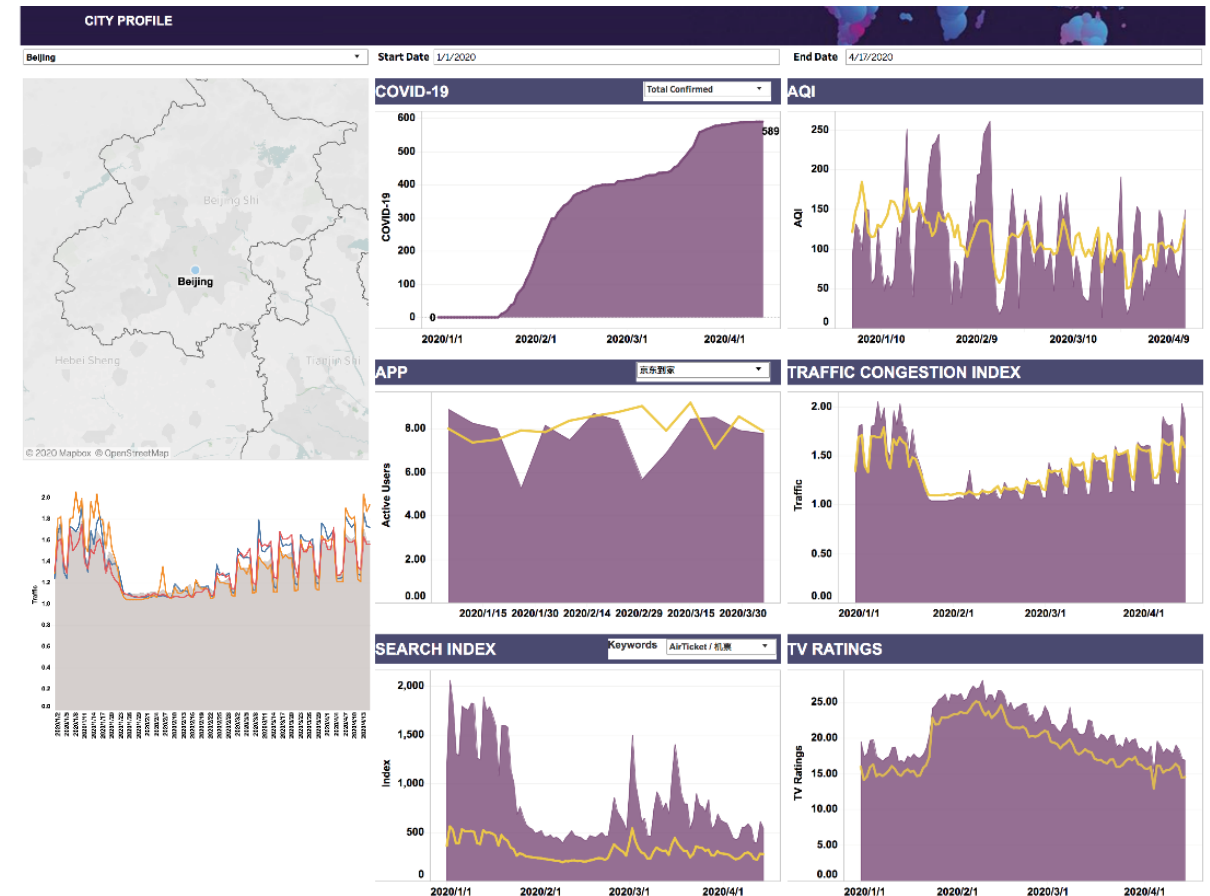
But consumers are also more open to light-hearted
content and appreciate distraction from the crisis



MANAGING A COMPLEX MARKET

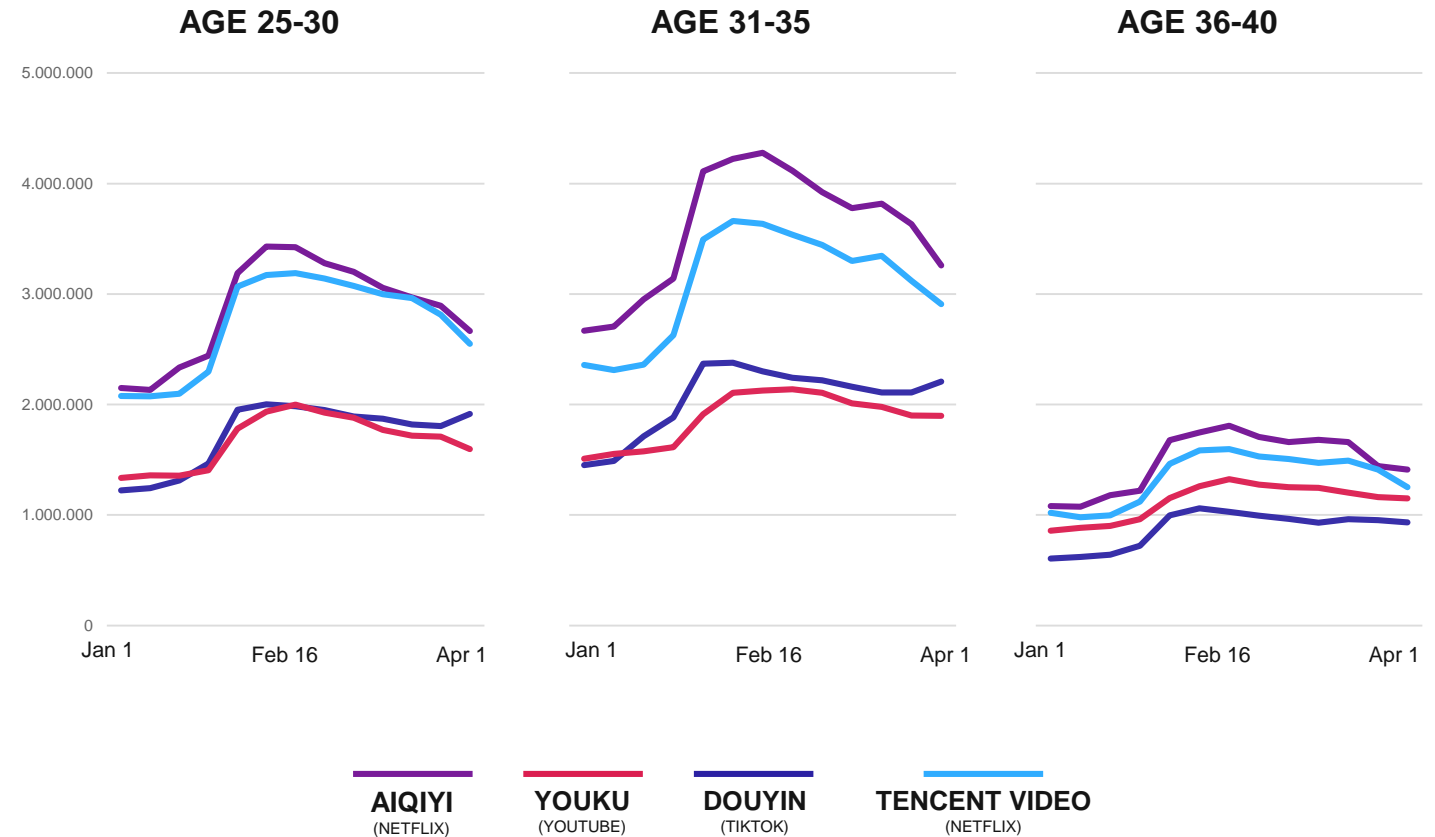
TRACK THE COUNTRY ON ITS WAY BACK TO NORMAL

- With large differences between rural & metropolitan areas, China is a very complex market to analyze
- Additionally, getting reliable & automated access to data can be a challenge with APIs often not being available
- Despite, the team has brought together an informative dashboard of key indicators to support strategy



PEOPLE HAVE ESTABLISHED A NEW VIDEO BEHAVIOUR

- Both long- and shortform video platforms are showing similar consumption patterns, with a sharp increase in usage after the lockdown
- Especially the longform platforms (Aiqiyi & Tencent Video) have seen dramatic upticks
- Despite a current slow decline, they are still above historic benchmarks



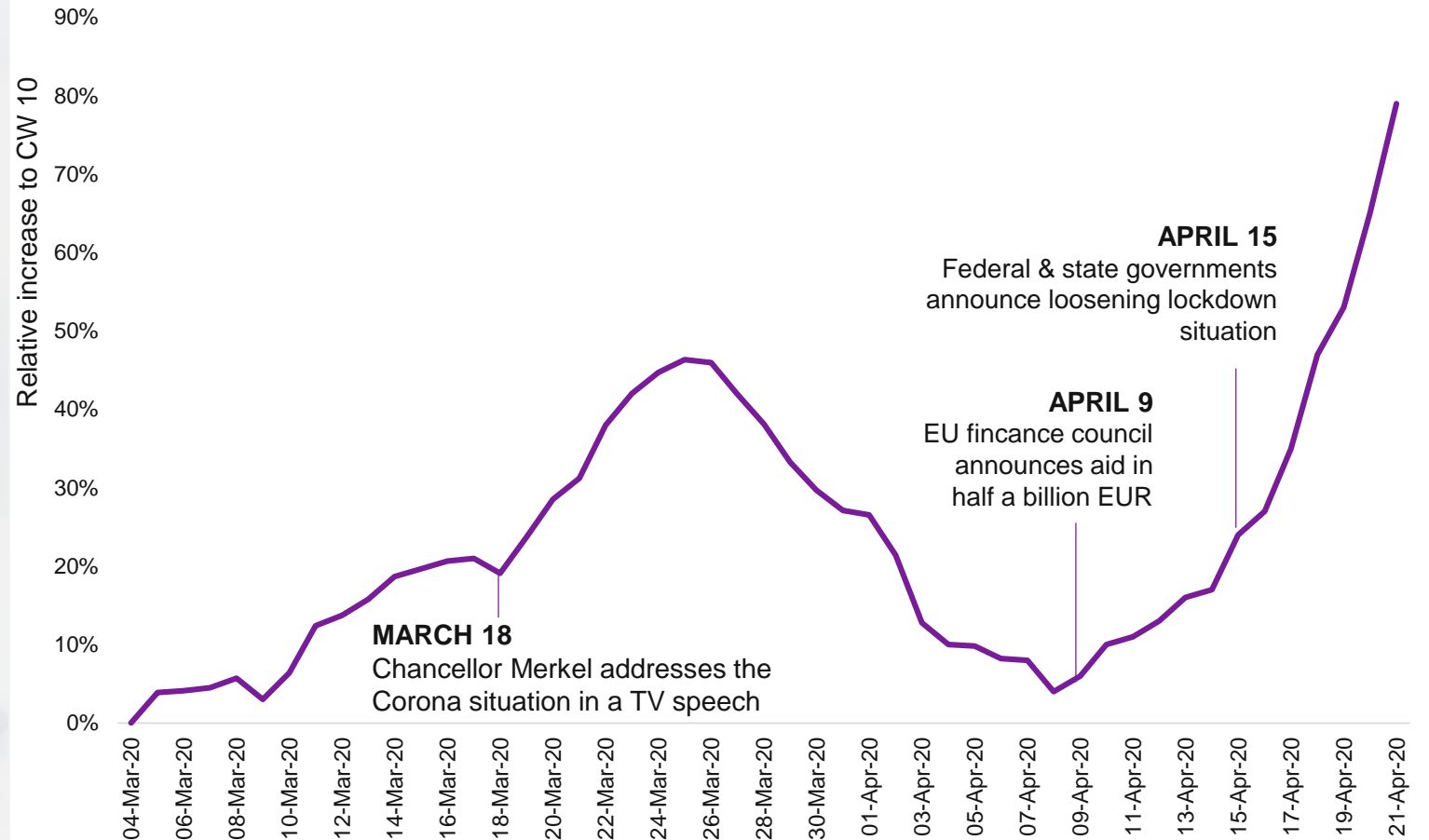


#3

DIGITAL AD DEVELOPMENTS

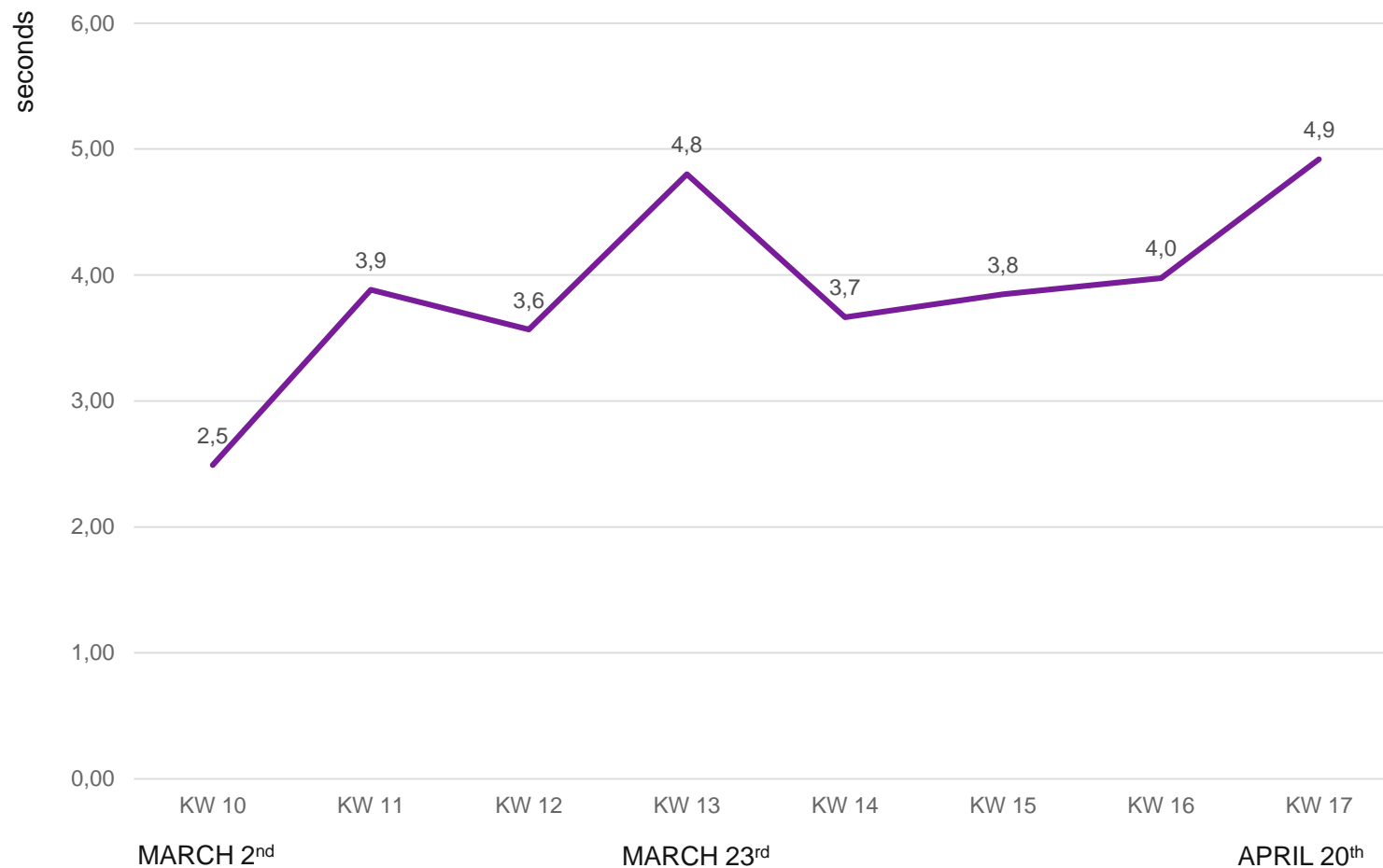
AS PEOPLE ENGAGE MORE ONLINE WE CAN JUICE UP THE TARGETING PROFILES

- The [M]Platform number '**Learnable Events per Digital ID**' has strongly increased since the start of the COVID-19 crisis in early march
- Learnable Events are instances where people load websites with an [m]Platform cookie, which enables us to add data points to their digital ID
- The increase in Learnable Events is thought to be caused by the extended & more extensive use of the internet by people trying to learn more about the crisis situation, as well as having more free time on their hands



PEOPLE STARING AD ADS

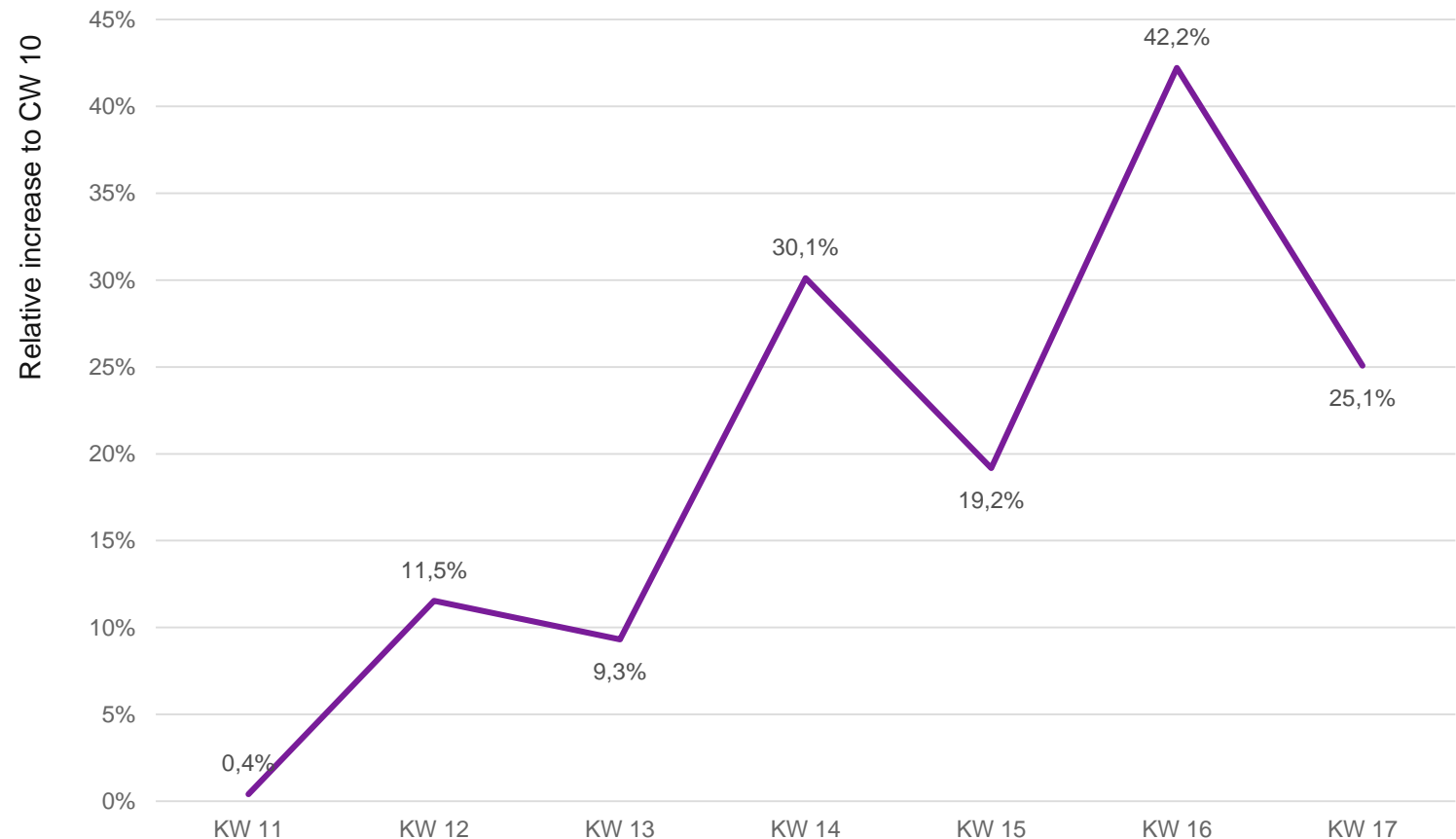
- The time between a served impression and a user click has nearly doubled from 2.5 to 5 seconds
- This indicates that users are more focused on the content than before



Source: [M]Platform Corona Performance Update. April 21

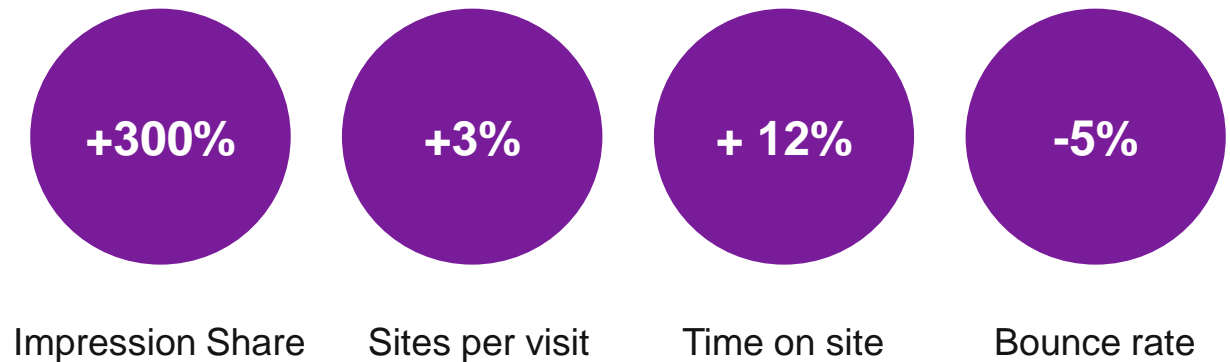
AND TRANSFORM FROM CLICK AVOIDER TO CURIOUS BEINGS

- Across all campaigns & formats, click-through-rates have shown a steady increase, resulting in a willingness to click on a display ad much higher than before
- In combination with the additional time they spend online, the increased CTR indicates the engagement with online ads has increased



IT'S TIME TO DEEPEN THE RELATIONSHIP THEY ARE ALREADY IN YOUR HOUSE

- Not only the ads work well, also the websites our clients are facing a great increase
- Across a broad client spectrum we observe a huge boost in impressions
- And people are giving themselves more time to explore the sites. Not only in the matter of duration but also in terms of pages they have browsed per visit



KEY OUTTAKES: DIGITAL PERFORMANCE IS UP AND CLIENTS CAN BENEFIT FROM INCREASED CONSUMER ATTENTION

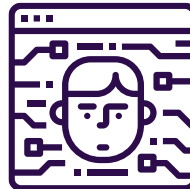
PEOPLE SPEND MORE TIME ONLINE & EXPOSURE TIME INCREASED BY 97%

People are not only spending more time online, but also their attention to individual pages increased, resulting in more time spent with ads



THIS INCREASED TIME ONLINE IMPROVES DIGITAL-ID DATA BY 60%

The increased amount of time that people spend online has led to more enriched Digital-IDs, improving our abilities to reach the right audiences with increased precision



CLICK-THROUGH-RATES ARE UP BY 25% ON AVERAGE

Whilst spending more time online, people are engaging more with online display advertising than before the crisis situation





#4

WHAT'S NEXT FOR BRANDS

KEY IMPLICATIONS

FOR BRANDS MOVING FORWARD

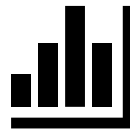
Guidance

Give guidance in the opening phase (e.g. major purchase) and anticipate relevant touchpoints (e.g. OOH).



Tracking

Track behaviour changes in the course of the pandemic and adapt your approach to market.



Deepen your relationship

Deepen your relationship to consumers with the help of digital data and consumer's extended presence on your own channels.



**WATCH OUT
FOR THE
NEXT EPISODE**

MINDSHARE

PERSPECTIVE FOR BRANDS

CW 20