



Crisis Response

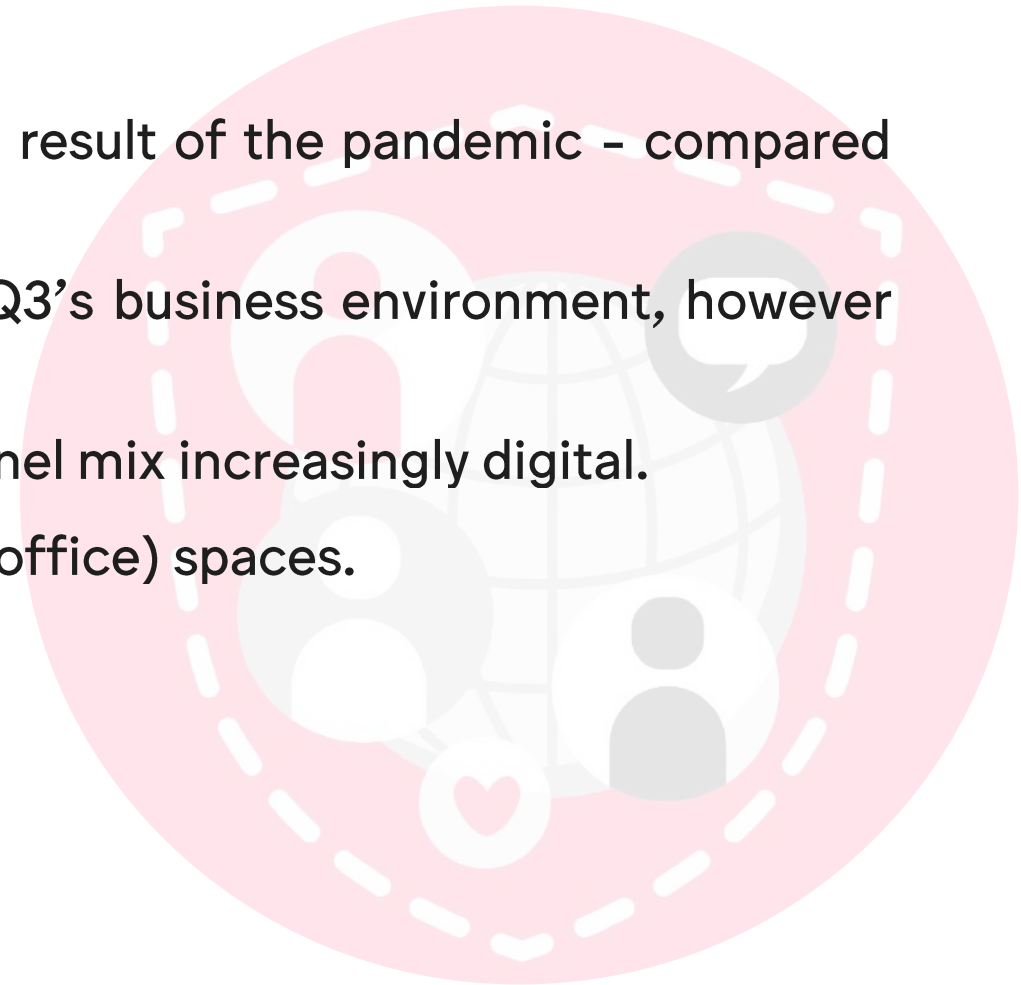
Wave IV Survey Results

30th September 2020



September (wave IV) research executive summary

- Less than half (46%) now deferring campaigns as a result of the pandemic – compared to 92% in June.
- This wave shows a more positive outlook towards Q3's business environment, however uncertainty remains regarding the next 6 months.
- Media investment is still down in Q1-Q3 2020. Channel mix increasingly digital.
- 2/3rds are rethinking the purpose of their physical (office) spaces.



About this research



Target

Senior marketers among WFA [membership](#)



Sample size

39 respondents from 35 companies representing approximately \$US 67 billion in annual media & marketing spend



Data collection

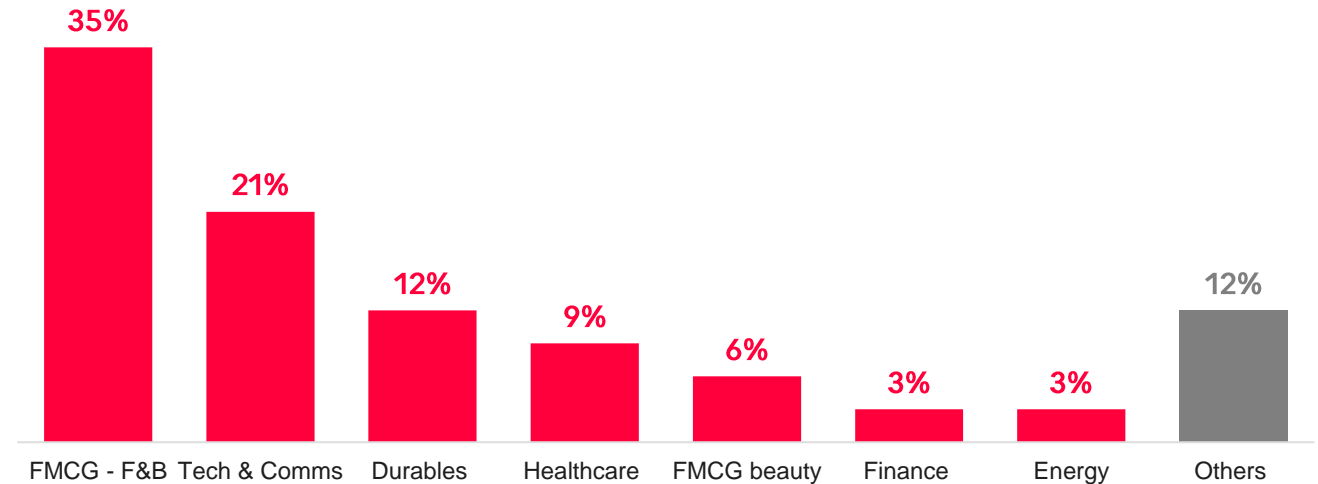
Online surveys



Period

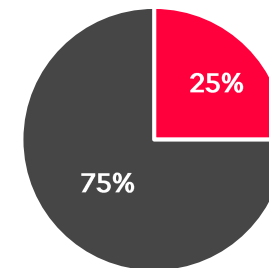
Wave IV: September 17th – 27th 2020

Respondents by sector



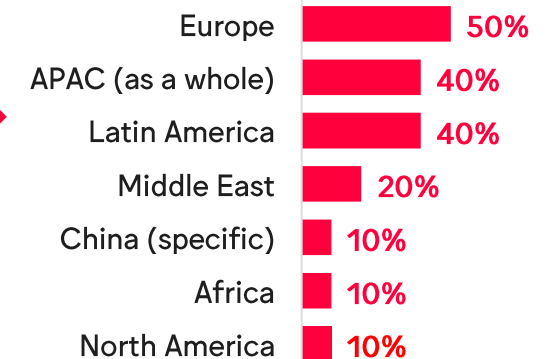
By remit

■ Regional
■ Global



By regions

(out of those in regional roles)



Our sample slightly more optimistic

How do you feel about...?

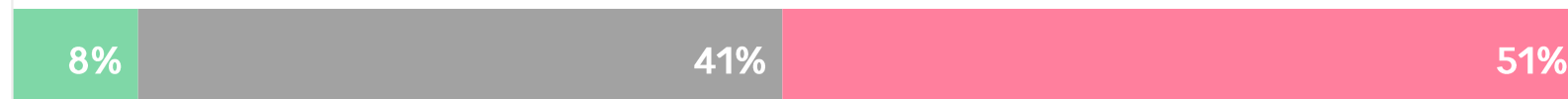
■ Positive

■ Neutral

■ Negative

The
current business
environment

June '20

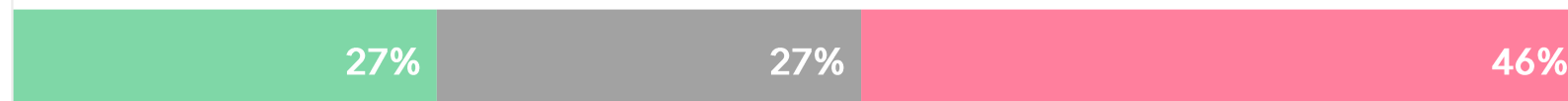


September '20



Business
environment in
the next 6 months

June '20



September '20

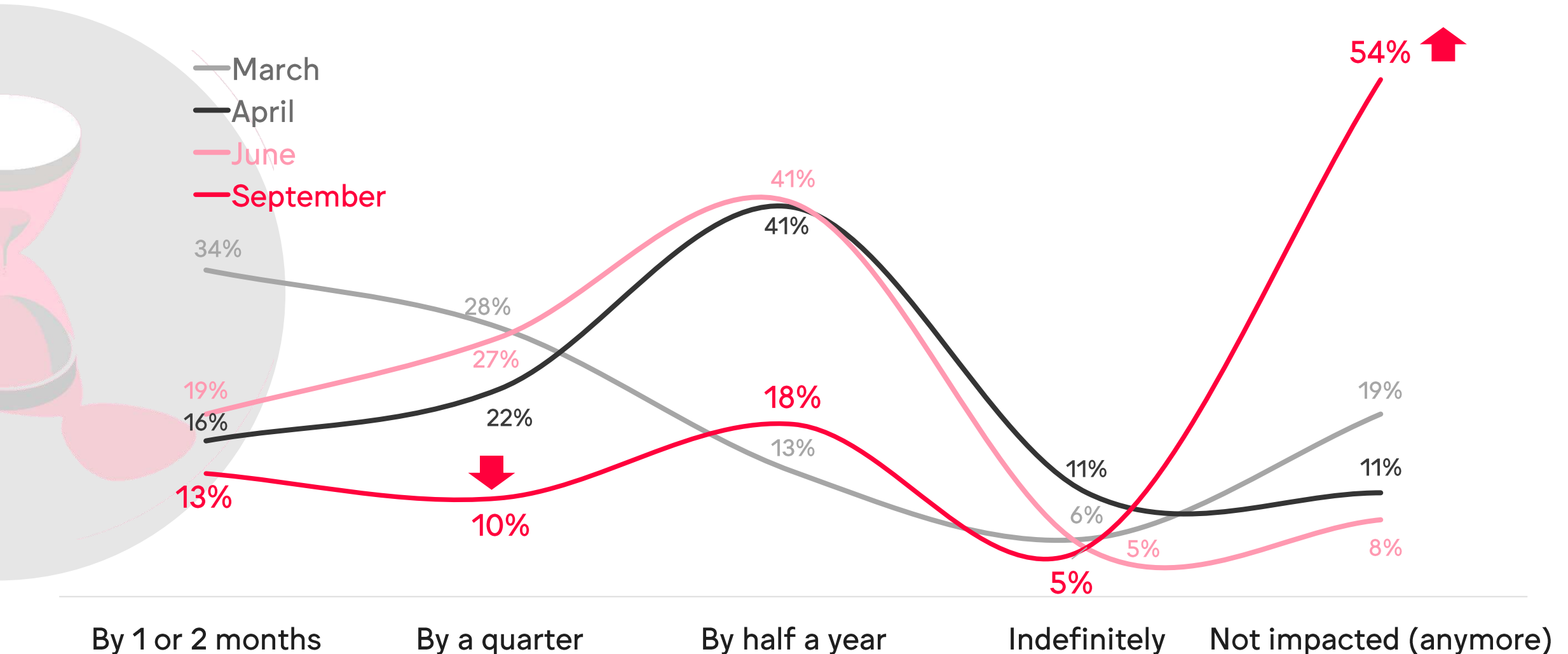


**Arrows highlight indicative results only*

Q: How do you feel about...?

Source: WFA Survey on Brands' response to Covid-19 Crisis, September 17th – 27th 2020; 39 respondents from 35 multinational companies in WFA [membership](#) Compared to 35 companies in wave III (June). Note: company sample was not identical

54% are no longer deferring campaigns



Q: Are any of your marketing campaigns still being deferred as a result of the pandemic?

Source: WFA Survey on Brands' response to Covid-19 Crisis, September 17th – 27th 2020; 39 respondents from 35 multinational companies in WFA [membership](#). Compared to 32 companies during wave I (March), 38 companies in wave II (April), 35 companies in wave III (June). Note: company sample was not identical

Lessons learned: Agility as standard

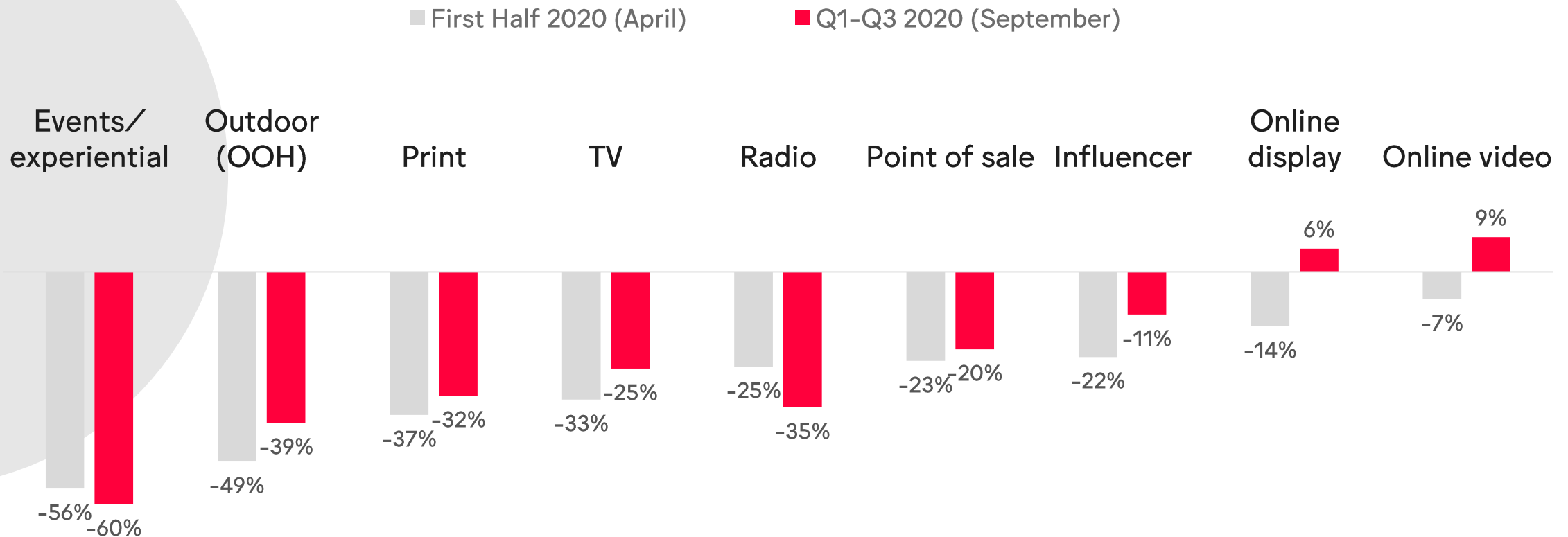
“ Agility and flexibility are even more important than we realized.

Be more agile and flexible, focusing on driving results despite the channel.

Q: What is the biggest lesson you have learned from 2020 relating to your marketing efforts?
Source: WFA Survey on Brands' response to Covid-19 Crisis, September 17th – 27th 2020



Investment is still down in Q1-Q3 (versus pre-covid plans), with a further shift towards digital channels



Q: How has the crisis impact your channel mix for the year so far (Q1-Q3), versus your pre-pandemic plans?

Source: WFA Survey on Brands' response to Covid-19 Crisis, September 17th – 27th 2020; 39 respondents from 35 multinational companies in WFA [membership](#). Compared to 38 companies in wave II (April). Note: company sample was not identical

Lessons learned: Seeing the big picture

“Adaptability and the need to build brands that serve the planet and people, not just prosperity.

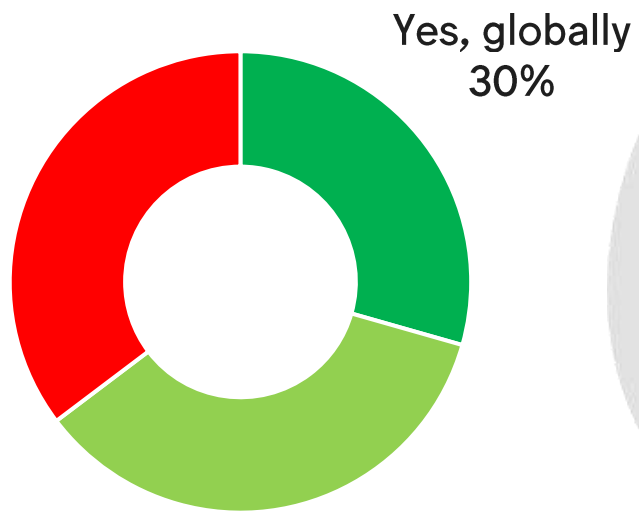
Need to be ready to respond to environmental changes more quickly. Sentiment can change quickly.



2 in 3 brands are considering the ‘purpose’ of their offices

Repurposing the purpose of your offices?

No, we aim
to return to
the pre-
Covid office
approach
35%



Yes, piloting new approaches in
some markets
35%

Redesigning into more collaborative / meeting spaces rather than individual desks.

Office workspace dedicated for collaboration. Normal working from home.

More working remotely. Fewer people in the office. Set times for coming into the office.

Giving the workweek a mix of office/work from home days.

Not clear yet, this is being discussed for all Europe, but for sure it will not remain as previously.

Questioning need for as many bespoke workstations - considering wider rollout of hot desks. Possible funding of office equipment for home use.

Do we need all this real estate?

Q: Some organisations already are considering remote working as a way going forward and are rethinking the purpose of their offices (i.e. more for ‘collaboration’ tasks rather than daily work for all full-time employees). Are you reconsidering the ‘purpose’ of your offices?

Q: Could you please include some details about the repurposing of your office spaces?

Source: WFA Survey on Brands’ response to Covid-19 Crisis, September 17th – 27th 2020; 39 respondents from 35 multinational companies in WFA [membership](#)

For more information

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The logo for Hogan Lovells, featuring the name "Hogan Lovells" in a serif font, with "Hogan" on the top line and "Lovells" on the bottom line, both in black text on a yellow rectangular background.

Note: All benchmarks, survey results, agendas and minutes are reviewed by Hogan Lovells International LLP, our competition lawyers

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