



# Covid-19 Response

## Wave II Survey Results

11<sup>th</sup> May 2020



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# April (wave II) research executive summary

- Almost 8 in 10 have deferred their campaigns as a result of the crisis; 52% of those by 6 months or more (up from 19% in March).
- However 68% already have ‘response’ campaigns live (up from 32% in March).
- Global average\* budgets down 36% first half 2020, 31% full year 2020.
- All channel investment down; TV by 31%, smallest declines seen in digital, notably online video (-7%) and online display (-14%),
- 73% agree brand owners need to find ways to support agencies during this crisis,
- 81% agree ‘The crisis has proven that brands have an important role to play in wider society’.
- The crisis is seen as ‘an opportunity to rethink our marketing organisation’ by 84%.

\*Approximate weighted average

Source: WFA Survey on Brands’ response to Covid-19 Crisis, April 22-28 2020; Base: 38 multinational companies in WFA [membership](#)

# About this research



## Target

Senior marketers among WFA [membership](#)



## Sample size

38 companies representing 17 industry sectors  
Representing approximately \$US46billion in annual media & marketing spend



## Data collection

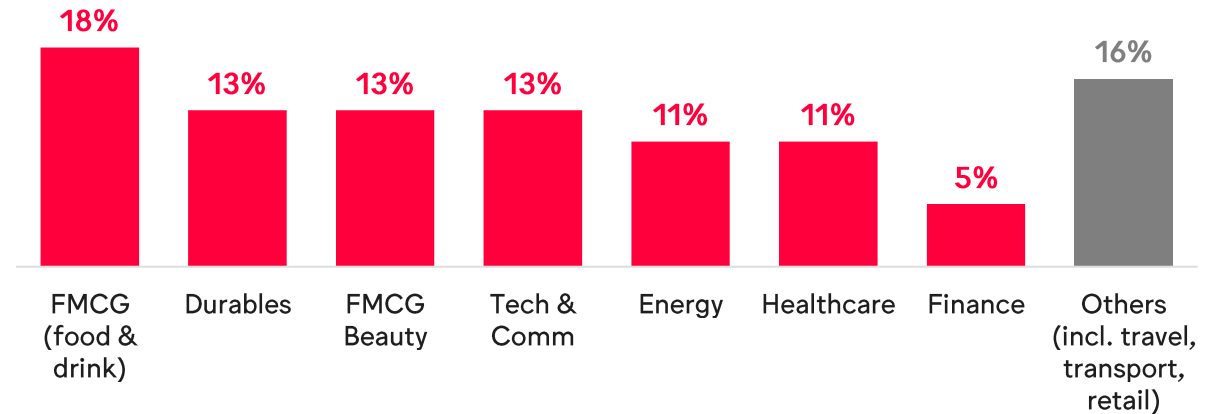
Online surveys



## Period

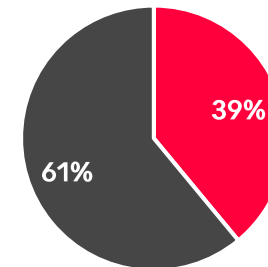
Wave II: April 22<sup>nd</sup> - 28<sup>th</sup> 2020

### Respondents by sector



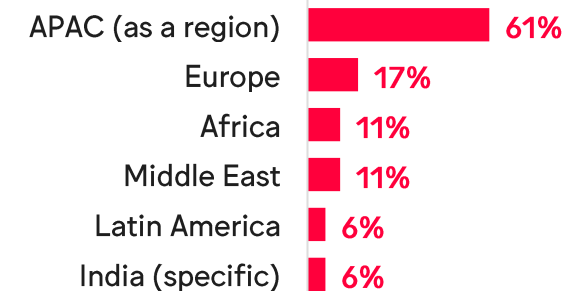
### By remit

■ Regional ■ Global

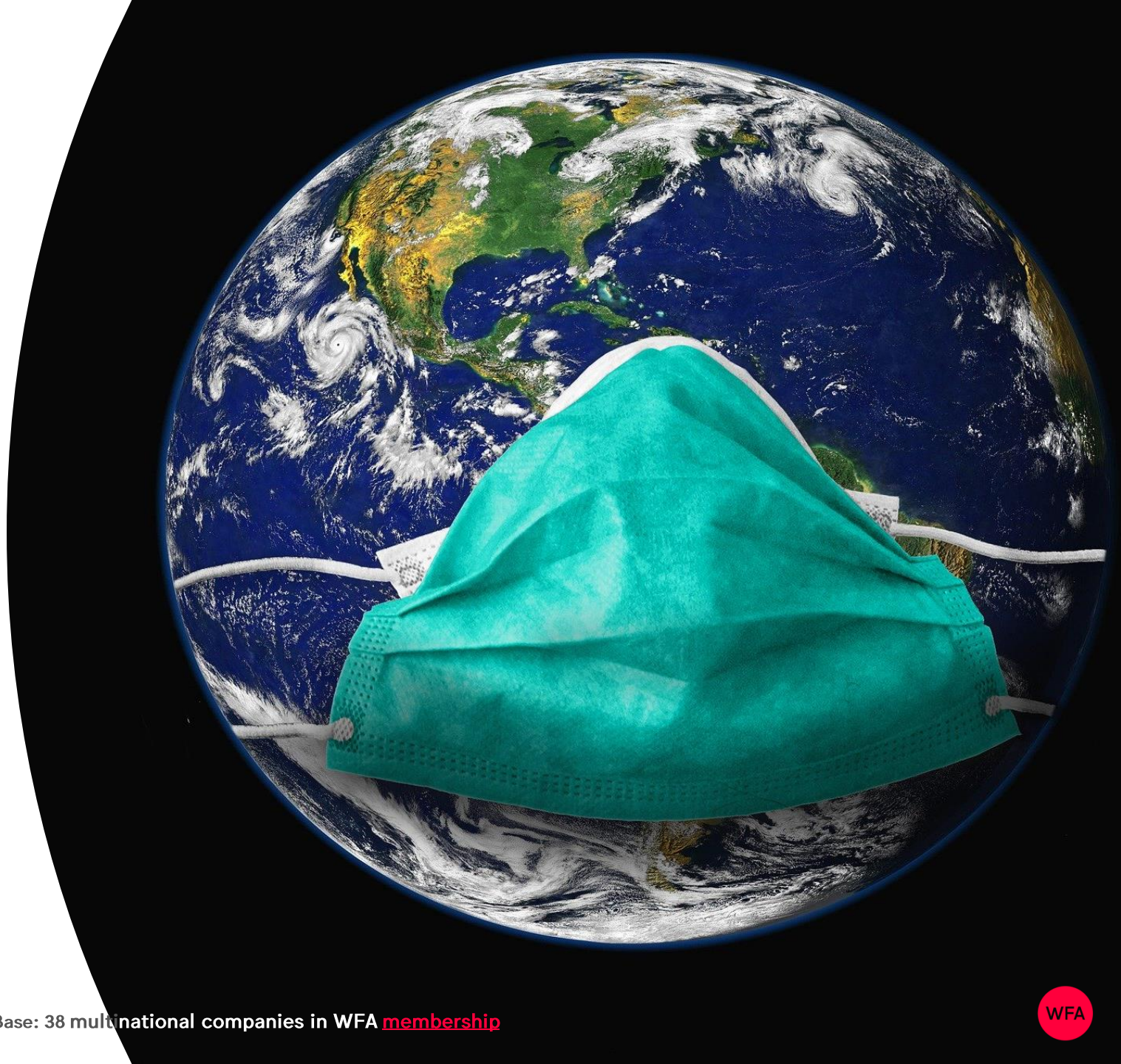


### By regions

(out of those in regional roles)

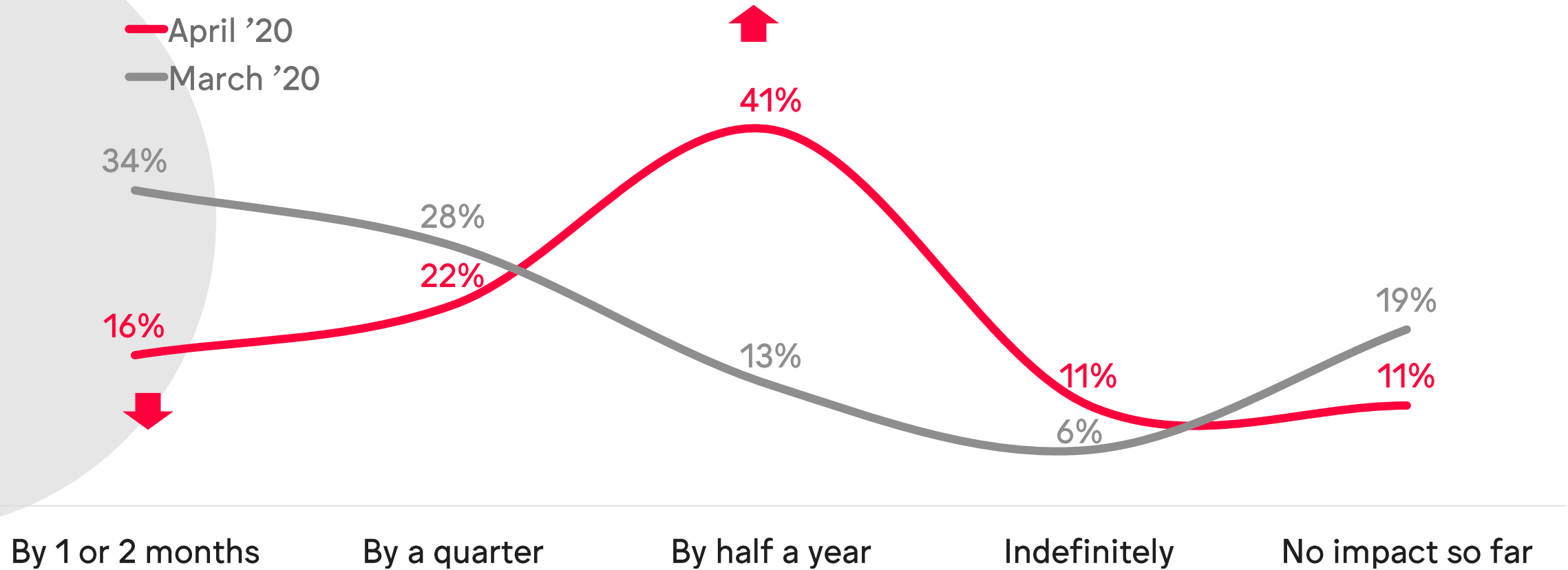


**92% agree** ‘the crisis will have a long-term impact on our marketing organisation’





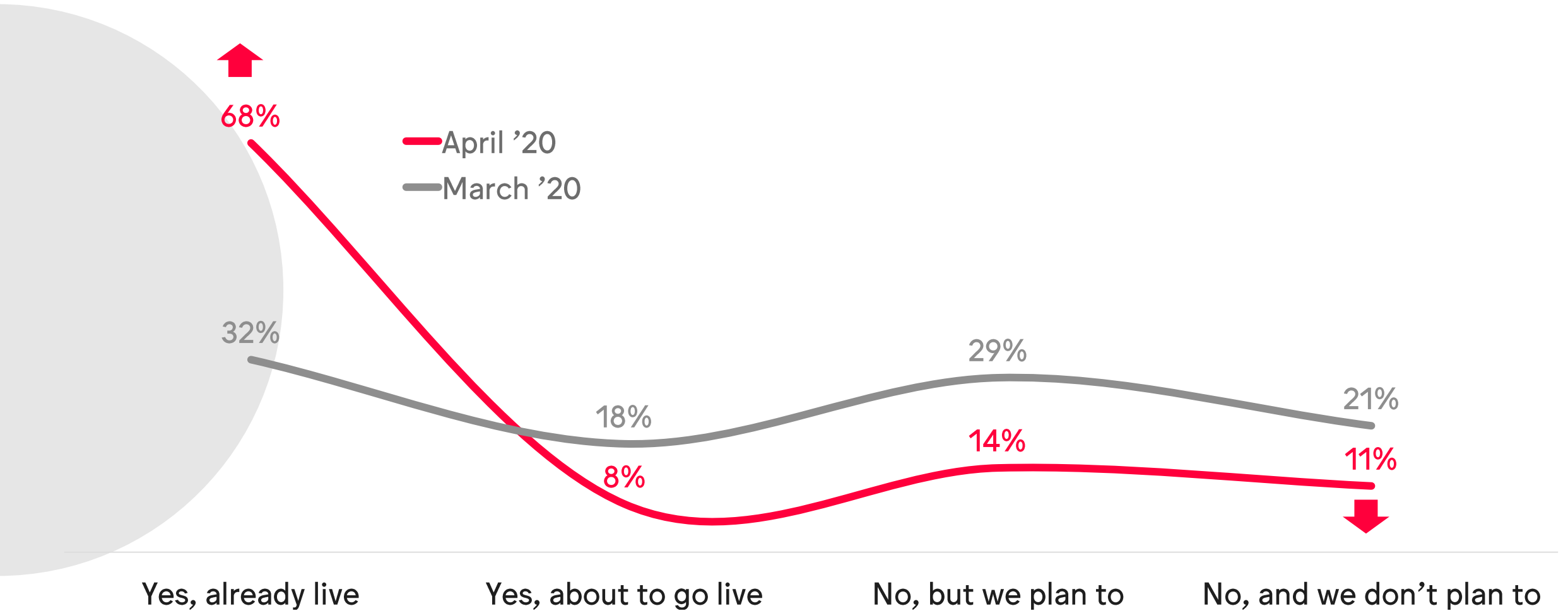
# The timeframe for deferral of campaigns is increasing



Q: Have any of your marketing campaigns been deferred?

Source: WFA Survey on Brands' response to Covid-19 Crisis, April 22-28 2020; Base: 38 multinational companies in WFA [membership](#)  
Compared to 32 companies during wave I in March. Note: company sample was not identical

# Vast majority now have 'response campaigns' live



Q: Have you created any new campaigns in response to the situation?

Source: WFA Survey on Brands' response to Covid-19 Crisis, April 22-28 2020; Base: 38 multinational companies in WFA [membership](#)  
Compared to 32 companies during wave I in March. Note: company sample was not identical. Other verbatims shown in notes below.

# Global average\* budgets down 36% FH, 31% FY

■ First Half 2020  
■ Full Year 2020

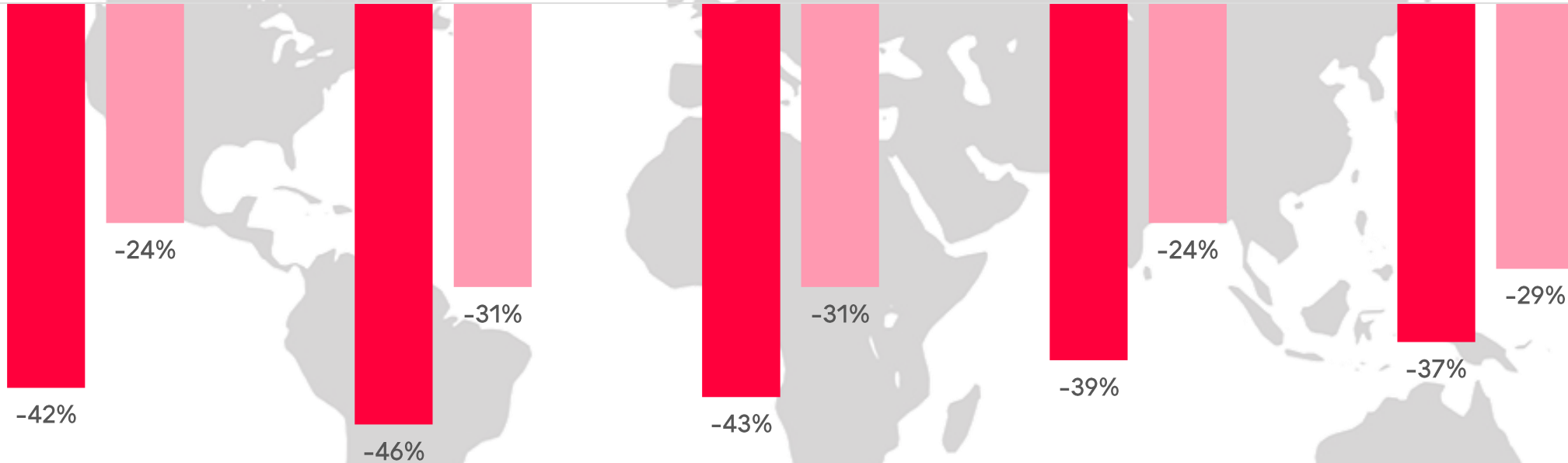
USA/Canada

LATAM

Europe

Middle East and Africa

Asia-Pacific



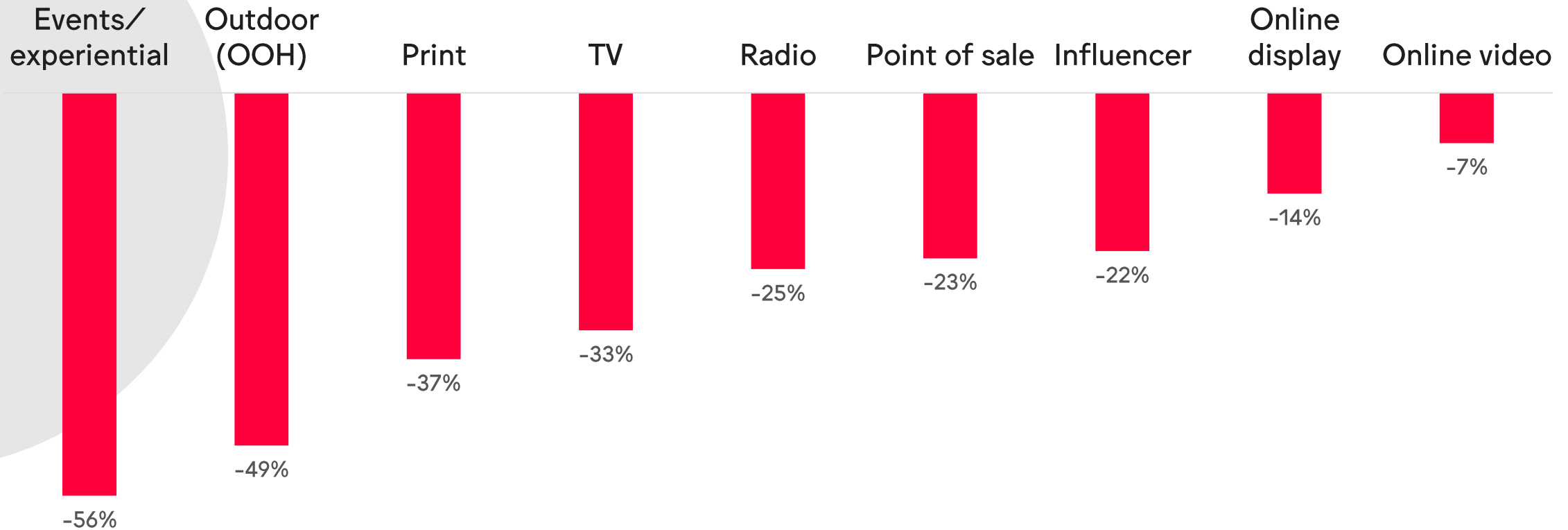
\*Shows approximate weighted average estimates against our sample.

Q1: Looking at your first half (Q1&2) 2020 media budgets, how do you think these will be impacted? Q2: Looking at your overall (full year) 2020 media and marketing budgets...

Source: WFA Survey on Brands' response to Covid-19 Crisis, April 22-28 2020; Base: 38 multinational companies in WFA membership



# All Q1&2 2020 channel investment down but shift to digital exacerbated



Q: How will the crisis impact your channel mix in FH (Q1&2) 2020?

Source: WFA Survey on Brands' response to Covid-19 Crisis, April 22-28 2020; Base: 38 multinational companies in WFA [membership](#)





**73% agree** ‘it’s incumbent on brand owners to find ways to support our partners (i.e. agencies) during this crisis’



**81% agree**

**‘The crisis has proven that brands have an important role to play in wider society’**



# COVID Compendium for Global Marketers



Share your  
stories with the  
community and  
learn from others

[wfanet.org/covid](https://wfanet.org/covid)

## What actions are brands taking around the world?

In response to the COVID-19 outbreak we wanted to provide an **open-source** resource for brand owners and the wider marketing industry: a compendium of brand actions around the world.

We have taken creative license with the 6Ps of marketing to help group 'marketer actions' into topics that you can easily digest. The final sections consist of links to external information kindly provided by our partners which may also be of use.

This is designed as a global hub to provide inspiration. We would welcome information about your own experiences and actions (anonymously if you prefer). You can [share your story here](#).

GO TO INITIATIVES ABOUT:

People

Promotion

Product

Price

Place

Partners

National leadership initiatives



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# For more information

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Hogan  
Lovells

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

## WFA Competition law compliance policy

The purpose of the WFA is to represent the interests of advertisers and to act as a forum for legitimate contacts between members of the advertising industry. It is obviously the policy of the WFA that it will not be used by any company to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition. The WFA carries out regular checks to make sure that this policy is being strictly adhered to. As a condition of membership, members of the WFA acknowledge that their membership of the WFA is subject to the competition law rules and they agree to comply fully with those laws. Members agree that they will not use the WFA, directly or indirectly, (a) to reach or attempt to reach agreements or understandings with one or more of their competitors, (b) to obtain or attempt to obtain, or exchange or attempt to exchange, confidential or proprietary information regarding any other company other than in the context of a bona fide business or (c) to further any anti-competitive or collusive conduct, or to engage in other activities that could violate any antitrust or competition law, regulation, rule or directives of any country or otherwise impair full and fair competition.