



# Crisis Response

## Wave IV Survey Results

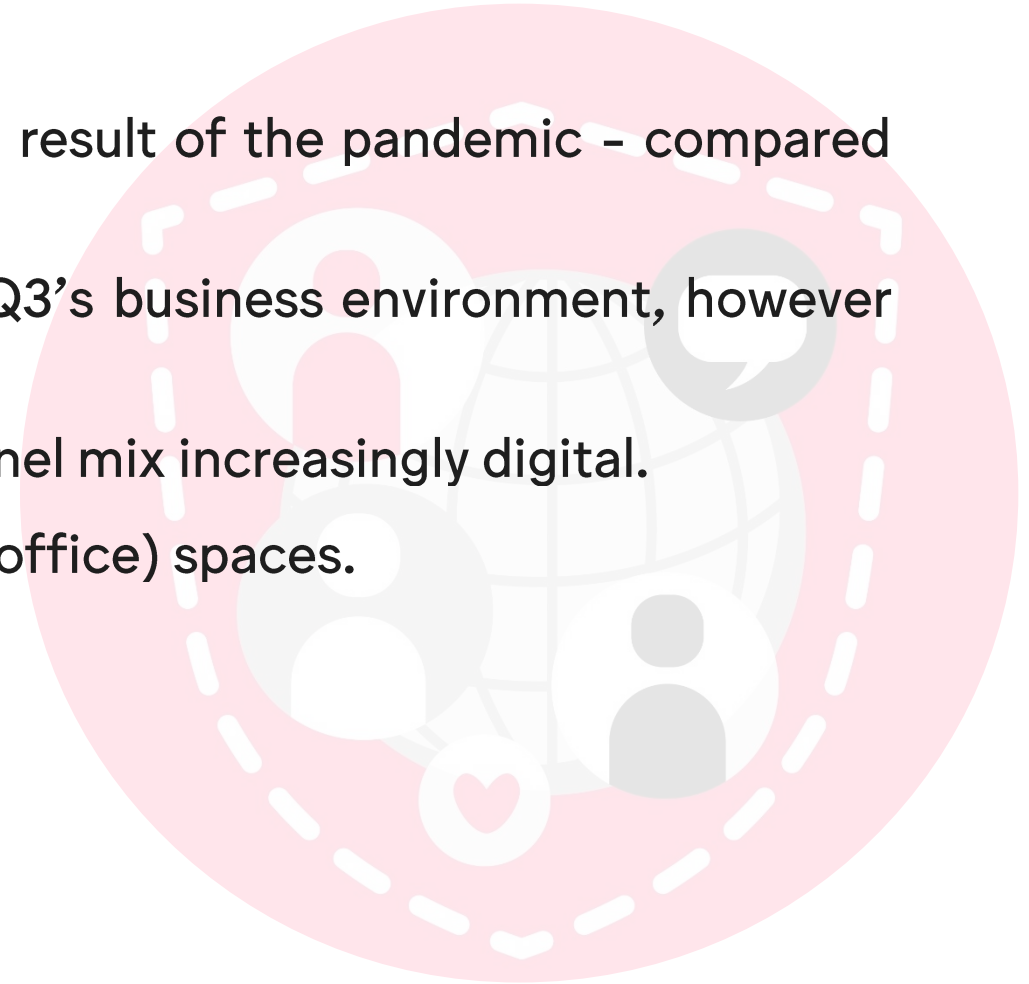


30<sup>th</sup> September 2020

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# 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

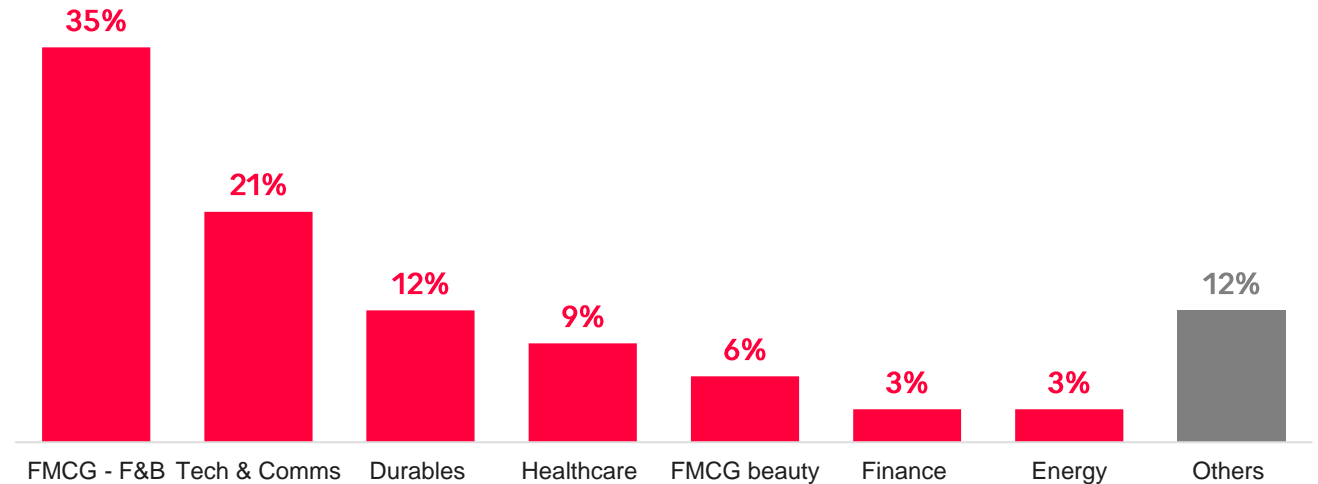
Online surveys



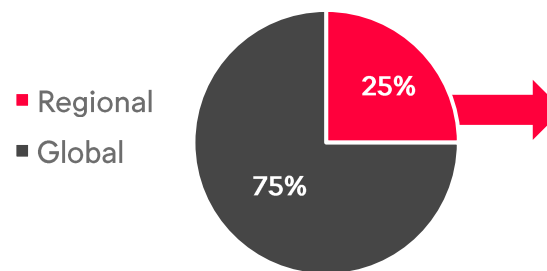
## Period

Wave IV: September 17<sup>th</sup> – 27<sup>th</sup> 2020

### Respondents by sector

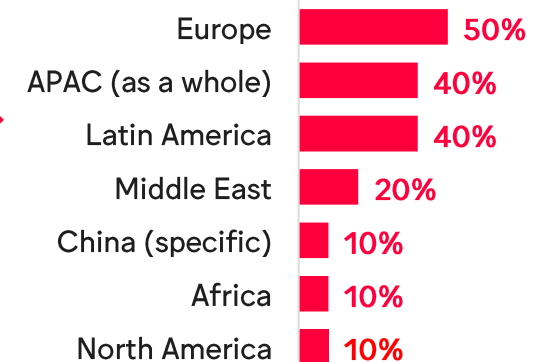


### By remit



### By regions

(out of those in regional roles)

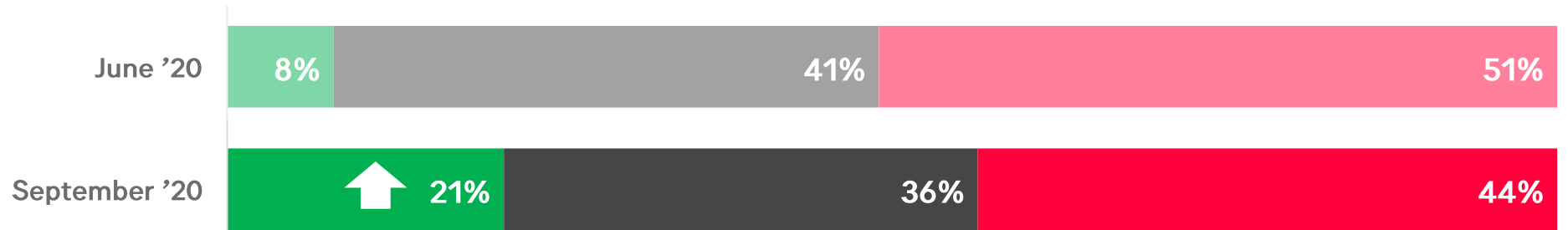


# Our sample slightly more optimistic

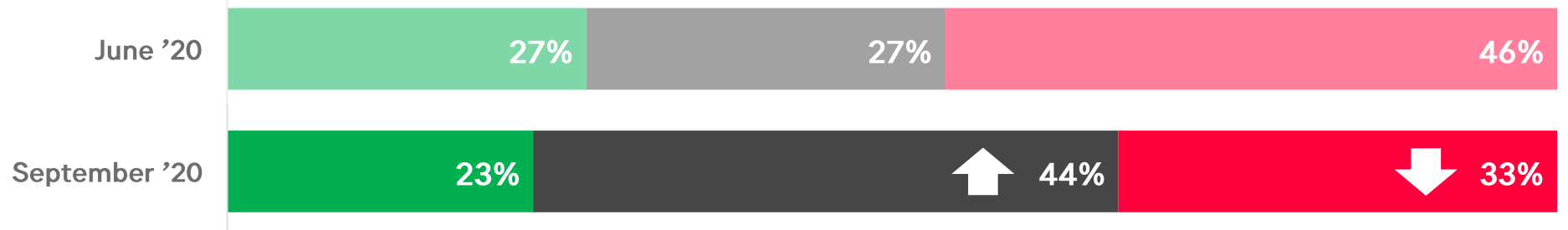
How do you feel about...?

■ Positive      ■ Neutral      ■ Negative

The current business environment



Business environment in the next 6 months



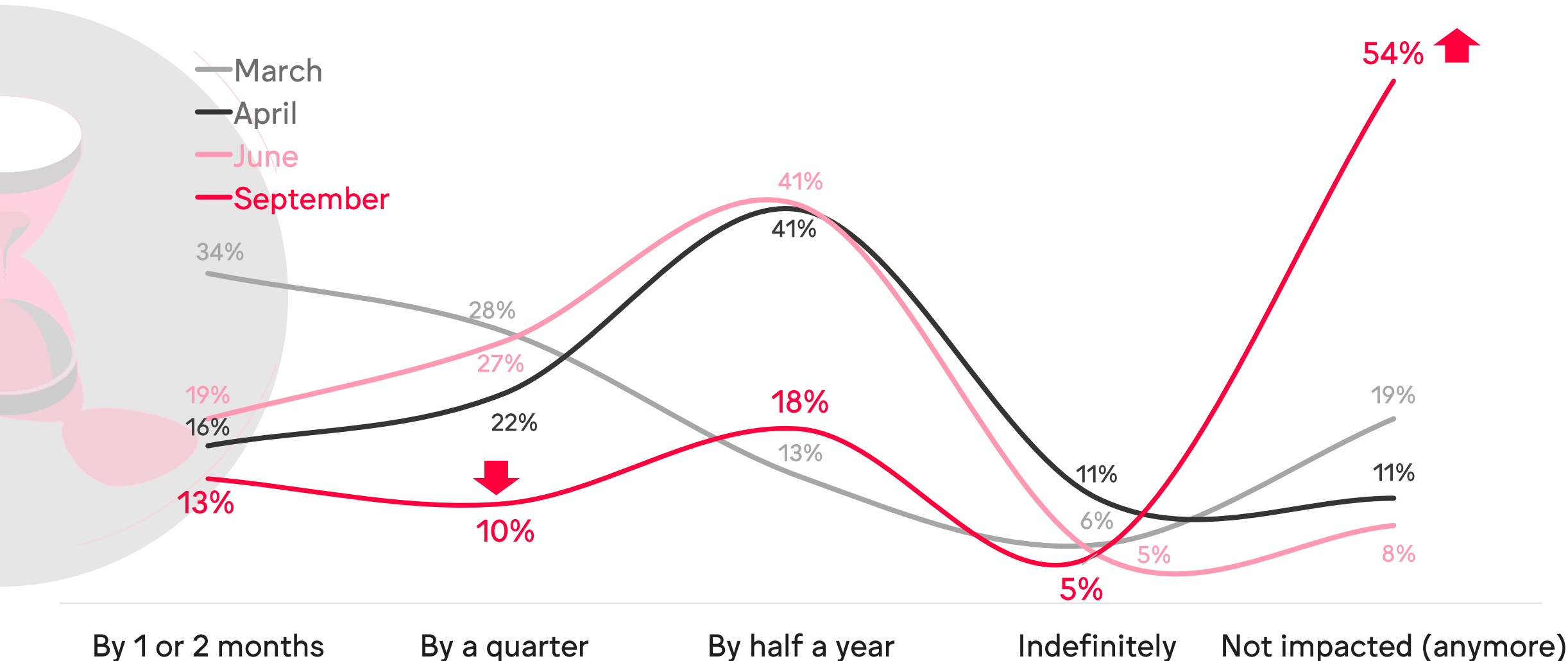
\*Arrows highlight indicative results only

Q: How do you feel about...?

Source: WFA Survey on Brands' response to Covid-19 Crisis, September 17<sup>th</sup> – 27<sup>th</sup> 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 17<sup>th</sup> – 27<sup>th</sup> 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



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# Lessons learned: Agility as standard

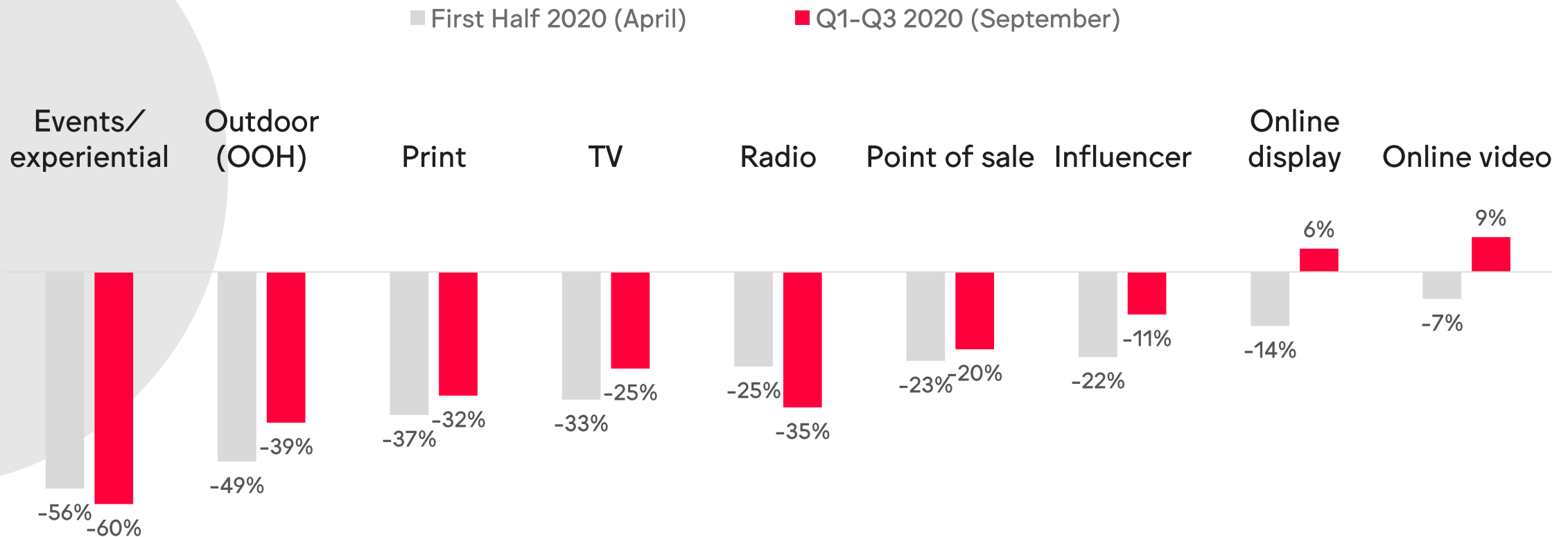
“ Agility and flexibility are even more important than we realized.

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 17<sup>th</sup> – 27<sup>th</sup> 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 17<sup>th</sup> – 27<sup>th</sup> 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.

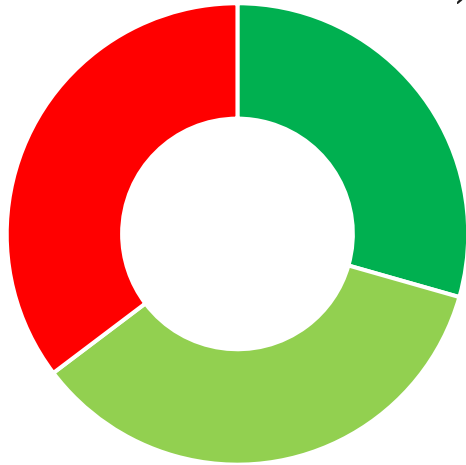




# 2 in 3 brands are considering the ‘purpose’ of their offices

Repurposing the purpose of your offices?

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



Yes, globally  
30%

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 17<sup>th</sup> – 27<sup>th</sup> 2020; 39 respondents from 35 multinational companies in WFA [membership](#)

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# For more information

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Lovells

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

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