

A group of people are sitting in the back of a car, looking out at a sunset. The scene is bathed in warm, golden light. In the center, a person wearing a denim jacket and sunglasses is holding a green apple. To their right, another person is holding a smartphone up to take a picture. The overall mood is relaxed and nostalgic.

KANTAR

Creative Guardrails for COVID Related Advertising

Wave 2

A look back at April Advertising

May 2020

People are feeling less uncertain, but also less positive over the past month

Reality is settling in about the long-lasting impact of the COVID-19 crisis.

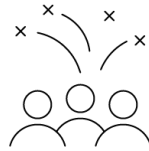


Uncertain

-4 pp

% Yes

March: 83%
April: 79%

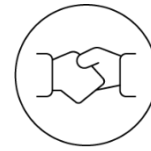


Community

-8 pp

% Yes

March: 82%
April: 74%



Togetherness

-8 pp

% Yes

March: 78%
April: 70%



Hopeful

-5 pp

% Yes

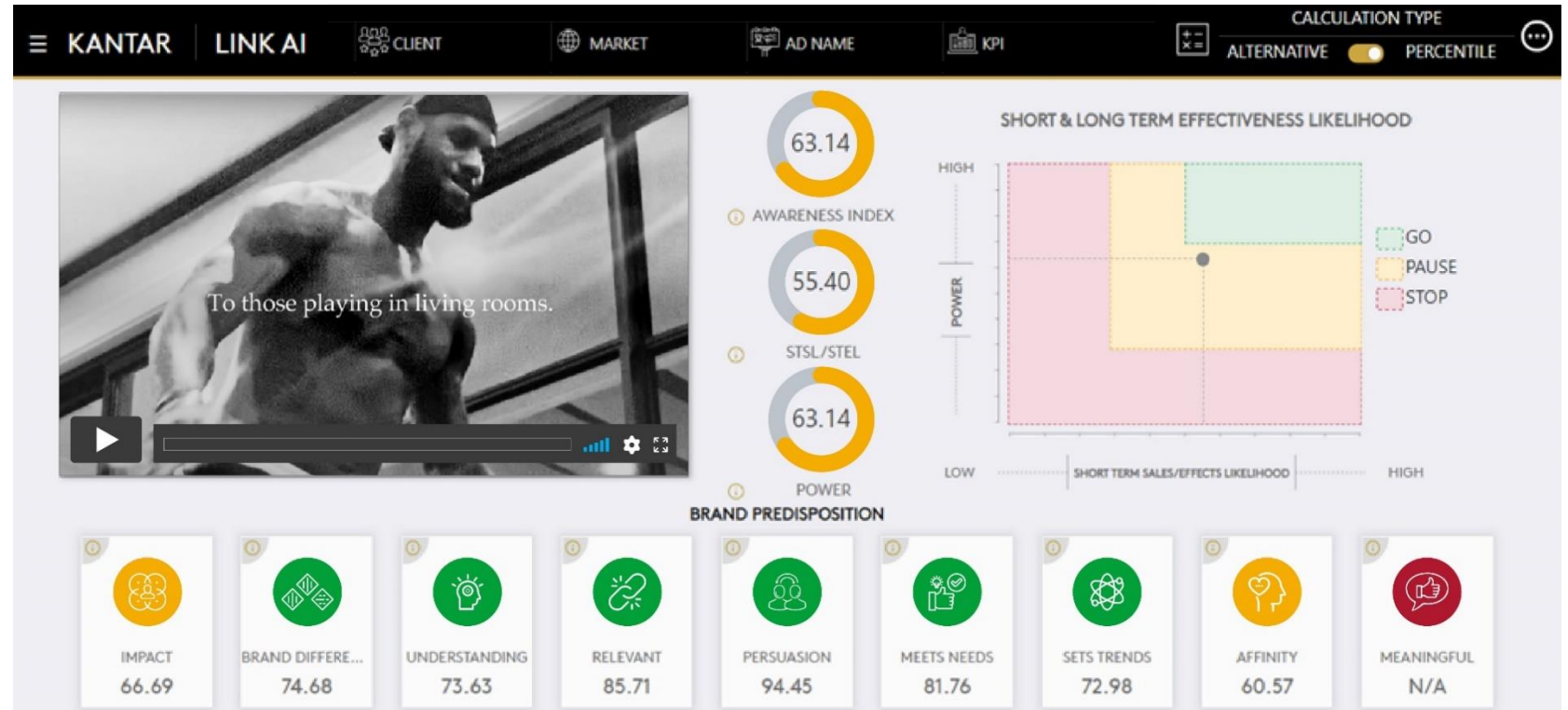
March: 76%
April: 71%

Getting it right, right now

During COVID-19 effective advertising needs to be in sync with what your brand stands for and what your consumers need to hear

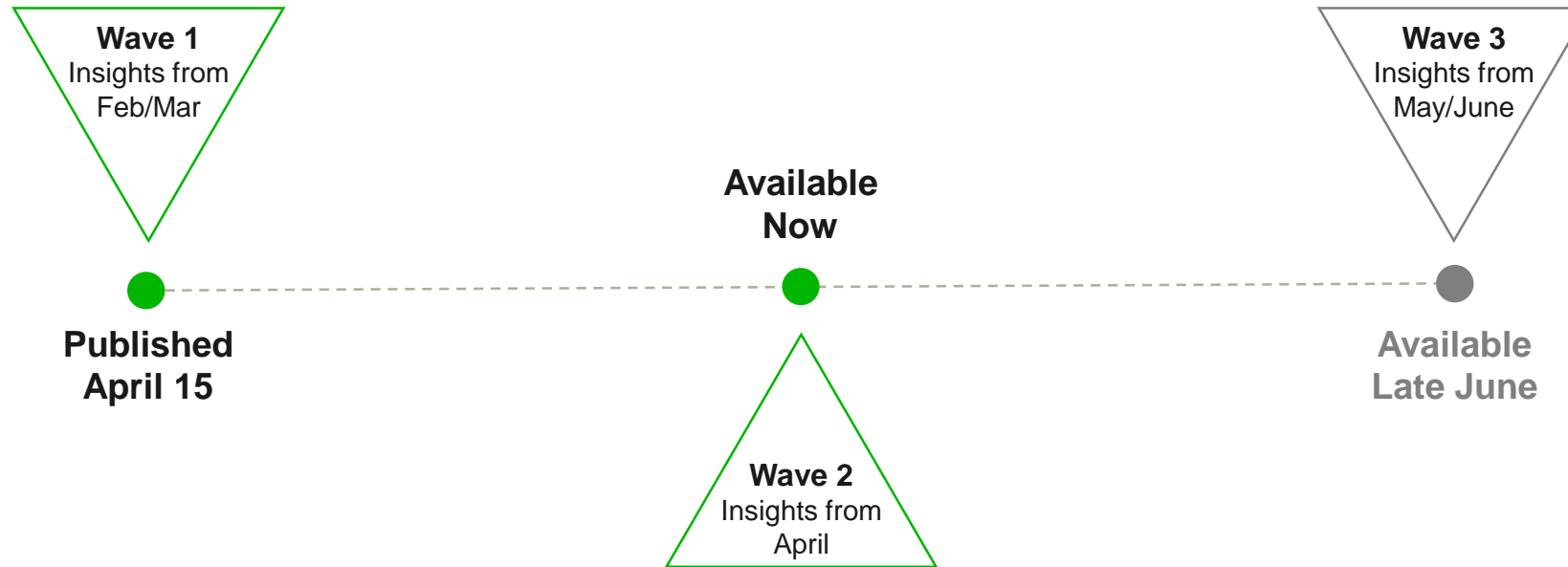
Knowing which content resonates over the course of the pandemic and into the economic slowdown is critical.

Consumer volatility, combined with brands' hampered ability to create new content, raises the bar even higher.






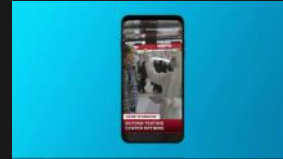










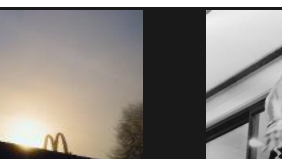
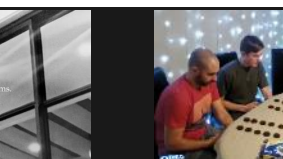
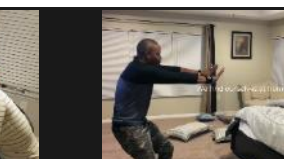




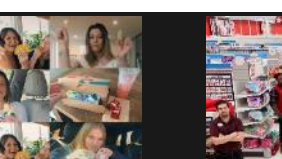
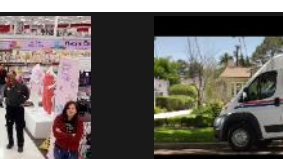
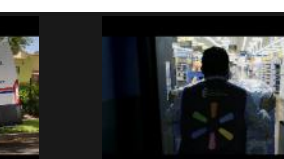
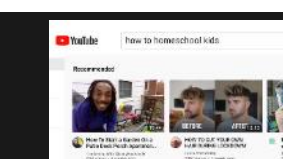
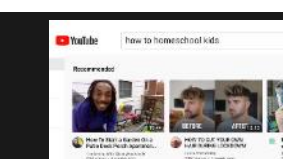
Creative Guardrails – measuring COVID-19 related advertising

Using Neuroscience and Link AI, Kantar is gauging Americans' emotions by sharing valuable creative effectiveness insights.



What did we learn in Wave 2?

We tested 26 ads from 18 categories that ran in the month of April

						
Amazon Rainbows of Hope	Amazon Rising To The Challenge	Apple Creativity Goes On	AT&T A Lot of Things on Your Mind	Budweiser (UK) Whassup Bud	Dove Courage Is Beautiful	
						
Frito Lay It's About People	Google Thank You Healthcare Workers	Hershey's Heartwarming At Home	Hyundai (Canada) Buy With Confidence	Hyundai (Canada) We're Here To Help	JPMorgan Chase Bank From Anywhere	
						
Kellogg's Thank You To The Heroes Bringing Breakfast To The Table	Kraft Heinz We Got You America	McDonald's Still The Same	Nike Play For The World, You Can't Stop Us	Oreo Stay Home Stay Playful	P&G Helping Homes In Times Of Need	Progressive WFH Role Play
						
Samsung Stay Apart, Stay Together	State Farm / ESPN The Last Dance	Taco Bell Friends \$5 Chalupa Cravings Box	Target Together at Home	USPS Certainty	Walmart Spark Heroes	YouTube Get By Together

1 Optimism in the face of adversity

Brands that show optimism in their messages, rooted in their brand DNA, outperform.

Who's Doing it Well

Taco Bell offers a deal and talks about sharing with old friends.
Nike celebrates people playing at home, inviting them to play together.
Hershey and Samsung talk about “coming together.”

Creative Guardrail

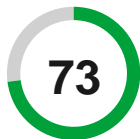
The optimism that works best acknowledges how we are living (including the limitations, confinement, virtual contact) and shows people making the best of it.

Taco Bell

Friends \$5 Chalupa Cravings Box



Branding



Short Term
Sales Effect

Nike

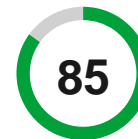
Play for the World, You Can't Stop Us



Enjoyment

Hershey's

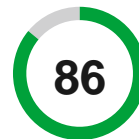
Heartwarming at Home



Enjoyment

Samsung

Stay Apart Stay Together



Enjoyment

2 Same as it ever was

Brands are seeing success by being constants in an uncertain world.

Who's Doing it Well

Kraft Heinz leads with its most familiar products (ketchup, mac and cheese) versus more innovative products.

Oreos make people think about how people play with Oreos, reminding people not just about their product, but how it is enjoyed, both in ritual and in the tactile feel.

Oreo
Stay Home, Stay Playful



Enjoyment

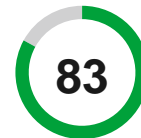
Creative Guardrail

Don't pretend to have the history and love if you don't.

Kraft Heinz
We've Got You America



Enjoyment



Appealing



Affinity

3 Whose skin is in the game

Messaging that show brands putting action over rhetoric perform better.

Who's Doing it Well

Frito Lay emphasizes employees and communities before its brands. Messaging focuses on what they do, putting action before rhetoric.

USPS features real employees talking about what they are doing during the pandemic. This message underscored what the USPS is doing for consumers at large.

Creative Guardrail

If messaging personifies what a company is doing in the face of COVID-19, make it about the effort the workers are making, not what management is doing.

Frito Lay
It's About People

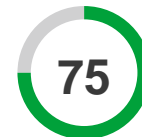


Enjoyment

USPS
Certainty



Enjoyment



Meets Needs

4 Dare to be different

We're experiencing C-19 message fatigue, some are even mocking sea of sameness.

Who's Doing it Well

Budweiser has brought back Whassup Bud by dubbing new dialogue into old footage and sensibly using humor to showcase connections. YouTube is recognizing the crisis we're in but staying consistent with their brand voice, and updating messaging knowing that what works yesterday may not work tomorrow.

Budweiser (UK)
Whassup Bud

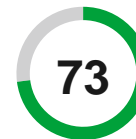
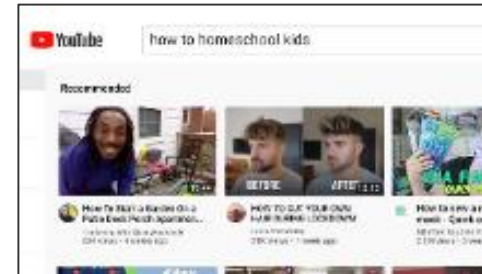


Enjoyment

Creative Guardrail

It's imperative to differentiate. Being light-hearted or using humor works when it's part of the brand's DNA and focuses on everyday life (and stays away from the heavier side of the crisis).

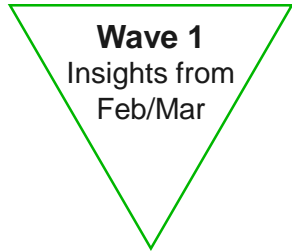
YouTube
Get By Together



Enjoyment

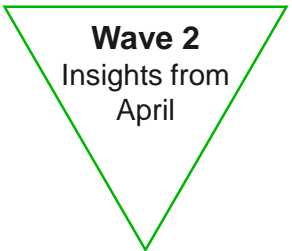
Emerging from the shock of it all and beginning to fight back

Creative differences between Waves 1 and 2



Wave 1 was much earlier in the pandemic-related lock down period, when we were in the throes of the unknown.

- Messaging rooted in deeper human understanding rated higher.
- Some brands weren't clear on what they meant to achieve, brands that focused did better.
- The brands that delivered more value, even if they were in demand, were more impactful.
- Brands that stayed true to their DNA (and didn't overstretch) did better.



Wave 2 feels different – Brands are trying to find their feet alongside a shaky America (a population that realizes there may not be a comfortable recognizable place to settle into for a long time).

- Brands that show optimism in their messages, rooted in their brand DNA, outperform.
- Brands are seeing success by being constants in an uncertain world.
- Messaging that shows brands putting action over rhetoric perform better.
- We're experiencing C-19 message fatigue, brands differentiating are breaking through.

Powered by Link AI™

The fastest and most cost effective solution for creative testing.

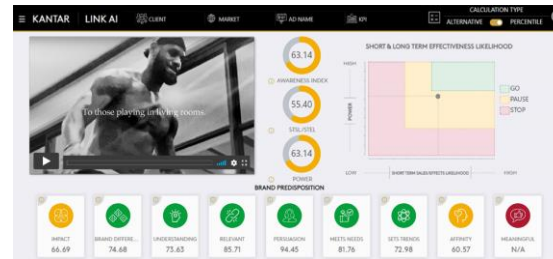
What it is

Link AI is a machine learning tool, fueled by our Link database with over 200,000 tests and 40M human interactions, providing uncompromised and actionable creative guidance.

In 15 minutes.

How it works

Upload a video and answer a few questions, results in 15 minutes



Online dashboard available June 2020

Benefits

- Save money without sacrificing development, deployment and most importantly – performance
- Test creative with confidence
 - Predict performance of ads across campaigns
 - Pre-screen ads early and iteratively through revisions
 - Test versions for expanded media formats
 - Post copy-test reevaluation to assess impact of refinements
- Increase speed to market
- Increase impact of media spend
- Use as a competitive intelligence tool

Trusted Results

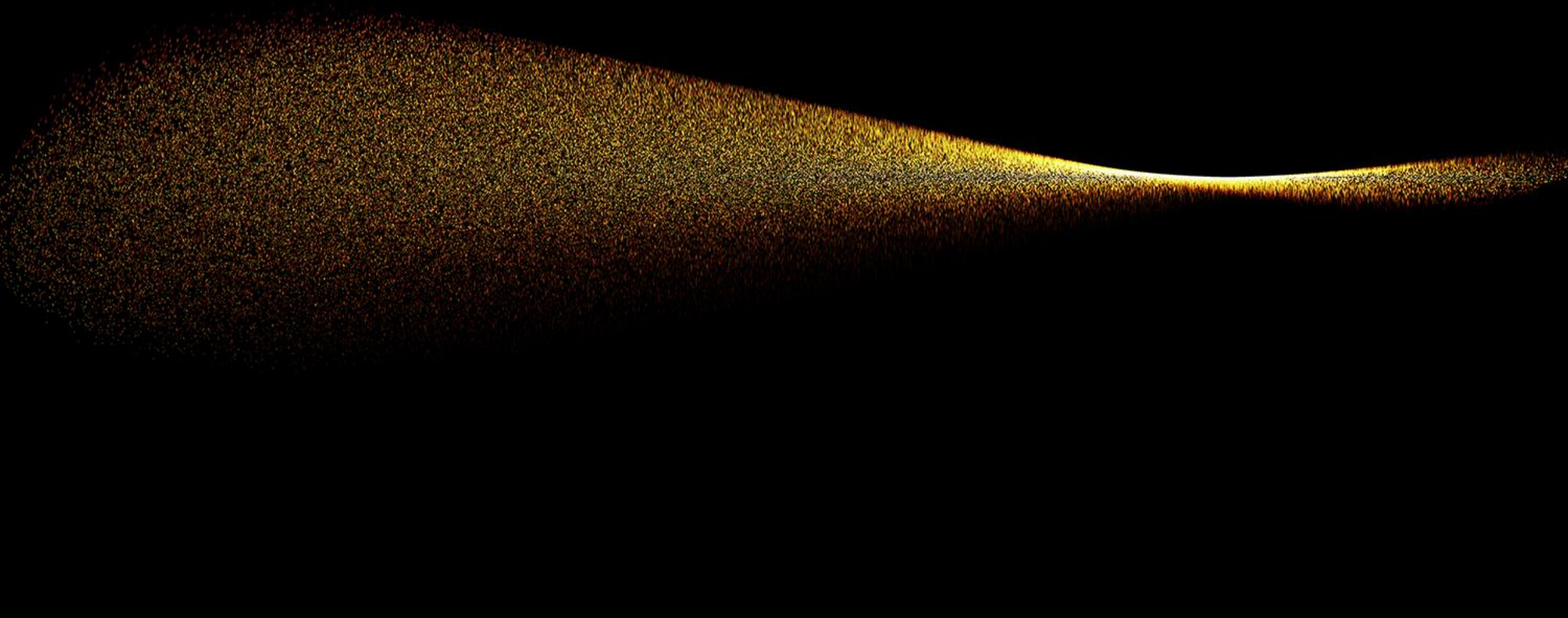
Validated by leading advertisers:



The Coca-Cola Company

KANTAR

Appendix



Wave 1: We tested 22 ads from 13 categories

All ads ran from February 20 – March 31, 2020



Angel Soft
[Rolling Up Our Sleeves](#)

Budweiser
[One Team](#)

Buffalo Wild Wings
[Sports Live On](#)

Burger King
[Contactless](#)

Burger King
[Minimum Contact Two
Free Kids Meals](#)

Chik-fil-A
[We're Here For You](#)

CVS Health
[Free Prescription
Delivery](#)

CVS Health
[Social Distancing](#)



Domino's
[Contactless Delivery
Business](#)

Ford
[Built to Lend a Hand](#)

Grubhub
[Restaurants Are Our
Family](#)

Hotels.com
[Social Distancing](#)

IKEA
[I Stay Home](#)

Jack Daniel's
[With Love, Jack](#)

Jersey Mike's
[Our Family](#)



Miller Lite
[#VirtualTipJar](#)

Nissan
[Ode To Empty Roads](#)

Perdue Farms
[Appreciation](#)

Sling
[Staying Safe Means
Staying at Home](#)

T-Mobile
[We're With You](#)

Verizon
[We're Here And We're
Ready](#)

Vodafone SPAIN
[Together](#)

Wave 2: Measuring COVID-19 related ads in market April 1 – April 30

This report builds on relevant findings from multiple Kantar methodologies and layers on creative measurement insights from Link AI.

