

The Future of Marketing

Has the Covid-19 Crisis Forever Changed the Marketing World?

Human Impact Tracker



Has Marketing fundamentally changed?

The bottom line has never been as important as it is when you're going through a crisis. The past year has seen pretty much every company out there focusing more and more on how they can protect their bottom line. Of course, this always influences marketing activities and budgets, which can have a ripple effect to slow down growth even further - even triggering a recession in some markets.

At the beginning of the pandemic, brands were left questioning whether their messaging was sensitive enough to talk about Covid-19 - Do we have a right to play here? Is this a topic we should be really talking about? With a lot of sales moving online, it changed the way companies distributed their budgets. For example, should store activations continue or should all marketing capital be diverted into digital channels?

“

I want to see brands doing good for people. I want to know that people who they employ, or who use or buy their products are safe; and that they are doing something to make sure it stays that way.

Male, 36, US

“

It doesn't matter whether the times are turbulent. Products should be produced in a more environmentally friendly and climate-neutral manner. If a company manages that, it can enjoy the good publicity.

Male, 53, Germany

“

This situation shows us that we are all in the same boat and that we need to support each other. I am hopeful that this situation, which one day will pass, can promote global changes in the long run, such as being more supportive.

Female, 27, Brazil

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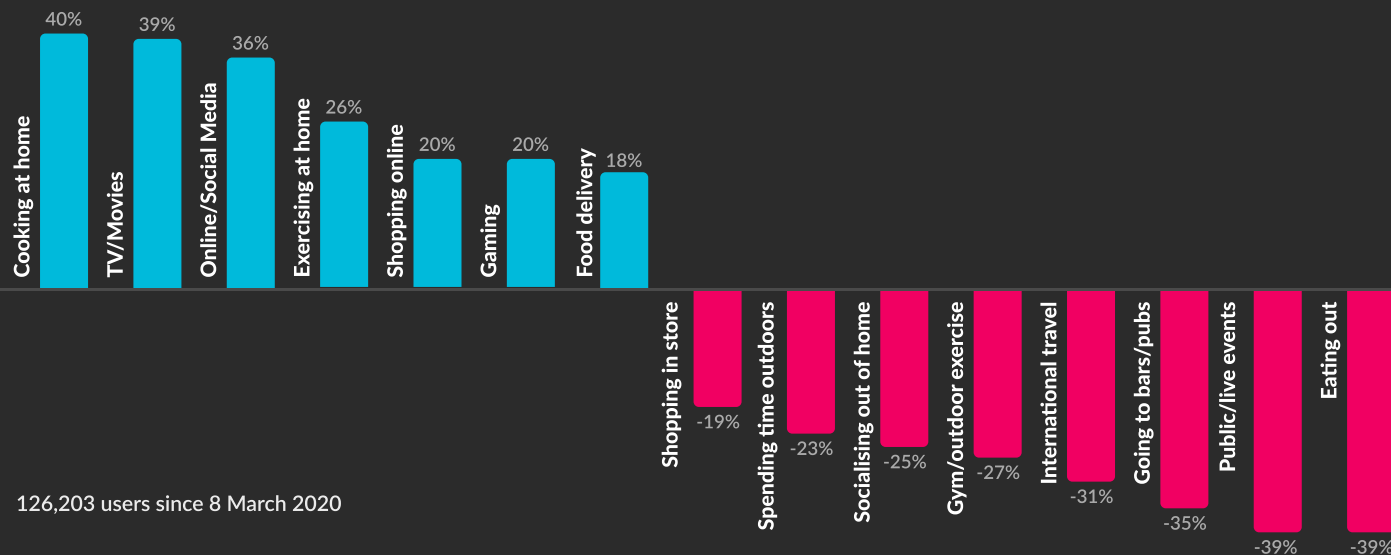


One of the leading factors that impacted the consumer world was the increased time spent at home - lockdown, social distancing, curfews etc. This has automatically shifted a lot of behaviours - those usually done out of home have either been adapted for inside the home or cut out completely.

For example, gum as a category was hugely impacted. It's a product that people choose in order to have fresh breath and help build their confidence when seeing people. When you're not spending time with others, this need disappears.

ACTIVITY ENGAGEMENT INDEX

Doing more (blue) Doing less (pink)



126,203 users since 8 March 2020



What the experts say

“The marketing landscape has shifted so dramatically. However, the fundamentals of marketing, particularly around empathy, haven’t shifted at all. If I look over the course of the year, as we’ve gone from wave to wave and other things have shifted, it’s really been critical that you have the right insights and consumer understanding.”

Faith Chaibva-King’ori

Strategy Insights and Analytics Director at Mondelēz International

“The only fundamentally new thing is that there is a new risk, which is another person as danger to me. This creates crowd anxiety, and this changes the behaviours and tensions. For example, there is huge demand for prepackaged food and goods, which goes against the trend of the desire to be green. Also, the mental health challenges that people are facing have had a huge impact across the board.”

Ruti Amal

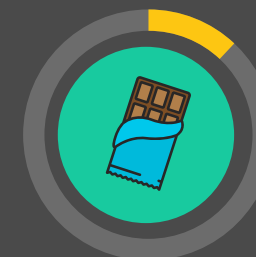
Group Head of Insights at Sodexo

Streetbees’ COVID-19 Human Impact Tracker
100,000+ conversations, 190 countries

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WHAT IS YOUR STAPLE SNACK/TREAT ITEM RIGHT NOW?



Chocolate
12%



Crisps/chips
10%



Chewing gum
8%



Biscuits
4%

Data from 36,248 in-the-moment
snack occasions

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“Digital will centrally remain a critical set of touchpoints. The surge that we have seen in e-commerce, particularly in Latin America, is enormous. At the same time, we know that people are expecting to go back to retailers, back to malls and supermarkets. Particularly in areas like Latin America where it's a very social culture.”

Juan Cuadros

Director of Insights and Analytics at Colgate Palmolive

A lot of things are getting accelerated right now, but what we're seeing is that there's nothing new about omni-channel or digitalization, authenticity, localization etc. The simple fact is, we've all had to adopt these strategies much faster than expected.



73%

of consumers have
increased the frequency
of their hand washing



29%

are showering more
often since the start of
the pandemic



Working together

Some industries are having to completely re-invent themselves - particularly those who previously relied on in-person crowds like retail, hospitality and live events.

Before the pandemic, entire businesses would experience the impact of new trends similarly, for example, the growth of ecommerce. Now though, they're touching different parts of the business.

This is a huge opportunity for marketing and insights functions to unite different teams and ensure consistent sharing of information.

There is no shortfall of data right now - the challenge doesn't come from collecting the data but to find the time to actually derive insights from it.



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Brands can't rely on historical data, or wait months for answers. They need to know what's happening now, especially in a climate that's changing so quickly. In order to make strategic decisions, marketers need to take a step back and access what they have, to really make the most of the richness of the data available.

The importance of local marketing teams really engaging with the consumers and understanding how they're shifting in the market is now more important than ever. Within that, brands must have clear segmentation on how it's impacting each of the different consumer groups.

“

I want to know that your product is safe, and if the company is ensuring the safety of their employees. Information that would be important to me would be what the company is doing to help the community during the Coronavirus

Female, 63, US

“

Brands must care about consumers, not only rely on profit. Brands must also pay attention to the fate of their employees, make continuous innovation, care about the environment and the Covid pandemic. Product content must be safe and clearly displayed on the packaging, production and expiration dates must exist. They should maintain quality and reasonable prices.

Male, 45, India



Diverging behaviours

There's been a lot of dichotomy in the kind of consumer behaviour that one is seeing across different categories, and it's still changing on a day to day basis. We're seeing tensions in the way consumers are reacting and this makes it particularly difficult for marketers to navigate this constantly changing consumer landscape.

The health crisis, combined with an economic crisis, has generated a dilemma in consumers - they know they need to prioritise health but they must also reduce their spend. And as we know, cheaper doesn't always provide quality. Therefore, it comes down to the value proposition of the product.

Streetbees began tracking the impact of the Covid-19 pandemic in January 2020, first in China, then as it spread to other markets, capturing the real reactions to the virus.

DIVERGENT TOP HABIT CHANGES PER CATEGORY

FOOD



VS

Eating healthy

More snacking

BEVERAGES



VS

More healthy beverages

CSD's = 2nd most consumed

By gathering millions of data points from more than 120,000 people across dozens of countries, we were able to understand what's really going on for individuals around the world.

Streetbees' proprietary machine learning algorithms were applied to the data collected from our bees (users) to uncover what's really driving these different consumer behaviours. What we found was that there are five key dimensions which underpin people's reaction to the Covid-19 crisis - how they are changing their consumption behaviour, how they're changing their attitudes and how they're responding to different stimuli. Based on these dimensions, we've uncovered four personas emerging out of the crisis.

The personas vary drastically with one another in terms of their fear of the virus, their concerns over financial impact, how they are feeling emotionally as well as how they are adjusting their consumption and purchase behaviours.

ALCOHOL



VS

Drinking less alcohol

Drinking more alcohol

HOME IMPROVEMENT



VS

Have/planning improvements

Not planning any improvements

Introducing the COVID-19 Consumer Tribes

These four tribes show the varying emotional state of consumers around the world and how this impacts their interactions with different categories, products and brands. As marketers, we need to recognise these differences – and similarities – and use them to fuel our short-mid term strategies in order to remain relevant to our consumers.



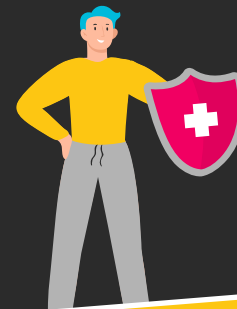
Opportunists

- ✓ Very low fear of the virus
- ✓ Not concerned by financial impact
- ✓ Understanding of situation
- ✓ Use as opportunity to further self



Survivalists

- ✓ High financial impact
- ✓ Financial concern outweighs fear of virus
- ✓ Survival mode for pandemic
- ✓ Only spending on necessities



Shielders

- ✓ Highest fear of germs and virus
- ✓ Leaving the house the least
- ✓ Shopping more online
- ✓ Spending more on personal hygiene



Jugglers

- ✓ Combined financial and virus fears
- ✓ Aware virus has impact on financial situation
- ✓ Aware if finances are impacted they can't prioritize their health

Creating nuanced communication strategies

As time passes by, the proportion of people adapting & juggling their routines & behaviours with this new reality will eventually grow. Things are constantly changing, and as time goes on, we will see more and more consumers fall into the Jugglers segment.

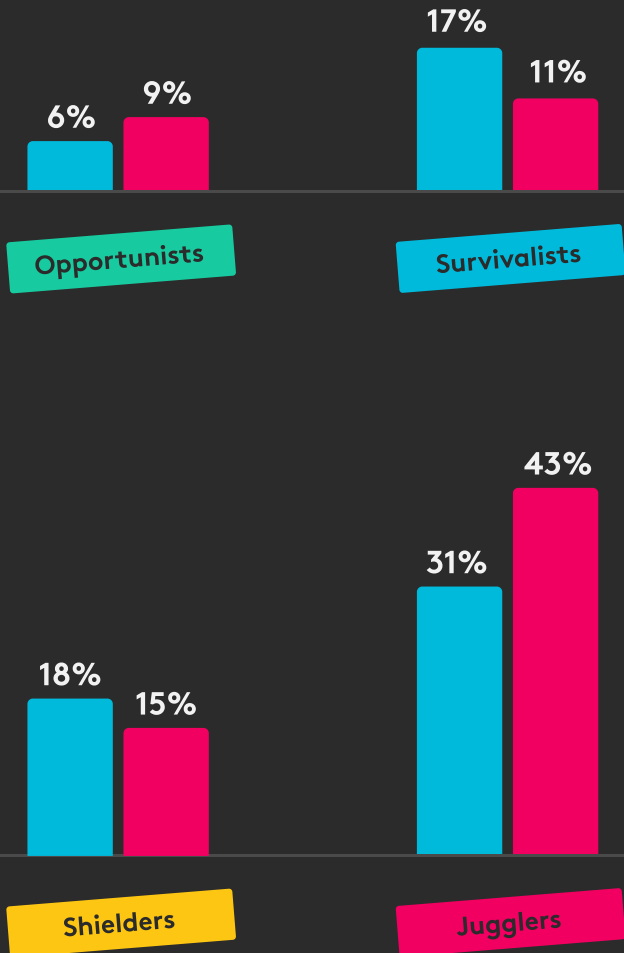
Formalising a nuanced approach requires overlaying our new understanding of consumer behaviour and reactions onto the typologies that brands already have. It is not about creating new consumer profiles or personas, but adding an extra layer to their context. This allows for more relevant and meaningful communications with our customers.

While consumers' fundamental needs may not change, the journeys and the tensions they experience do. Brands must map and redoing all these journeys in order to serve them better.

EVOLUTION OF TRIBES

● Mar 2020 (EU)

● Oct 2020 (EU)



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Building connections



Moving forward

Earlier in the year, there was a lot of mention of 'the new normal'. As the situation continues to change, but continues nonetheless, the world has come to accept that new or old 'normal' doesn't really exist anymore.

The Marketing world talks a lot about authenticity and changing the brand voice is not something you want to do overnight. It's important to stay true to how we are communicating ourselves. We must prioritise finding the practical applications from that consumer understanding.

The business and the insights community needs to lead the conversation and make sure that we drive where the business is going. It's critical to incorporate foresight and build a picture of the future based on multiple scenarios as we head into 2021.

“

I am feeling generally happy but still concerned about the pandemic that has not yet ended, which is accompanied by an economic recession around the world that has caused a lot of unemployment & hunger everywhere - really very worrying

Female, 51, Indonesia

“

I am feeling tired today. I was unable to sleep because yesterday I was stuck in the house - for the most part relaxing because there's not really much to do right now.

Female, 43, UK

“

I am feeling a bit overwhelmed today. There is so much housework to do since I have to do everything myself and there is no house help coming in plus I have a lot of work to do since I am working out of home.

Female, 36, US

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Here is some final advice from the experts - what should marketers prioritise going forward?

“Make sure design is in the heart of everything we do. We have a series of design workshops where we work with our end users from the very beginning, and across the different stages. We are seriously considering creating a new, ongoing consumer community. The same person will be a client of 15 different industries and 20 different services, so it's important to involve them in innovation, idea generation, validation, creation, and continuous development.”

Ruti Amal, Group Head of Insights at Sodexo

“Video is a simple tool but it has become more powerful than ever before. In video, they are in full controlling. There's more richness in the content because they're sharing absolutely everything, something that they didn't do when it was face to face. We must keep that conversation alive and understand how people are feeling during the crisis, after lockdown, transitioning into a more economic crisis, etc.”

Juan Cuadros, Director of Insights and Analytics at Colgate Palmolive

“2020 was a big shift as we all know, so we will have to revalidate some of our core assumptions and understand how those have changed. The push to become more insight and data driven is definitely a focus for us in 2021. We've always had all our data in different silos, so it's about really consolidating our deliverables, our analytical quants and power. Integration is going to be critical in really driving business decisions.”

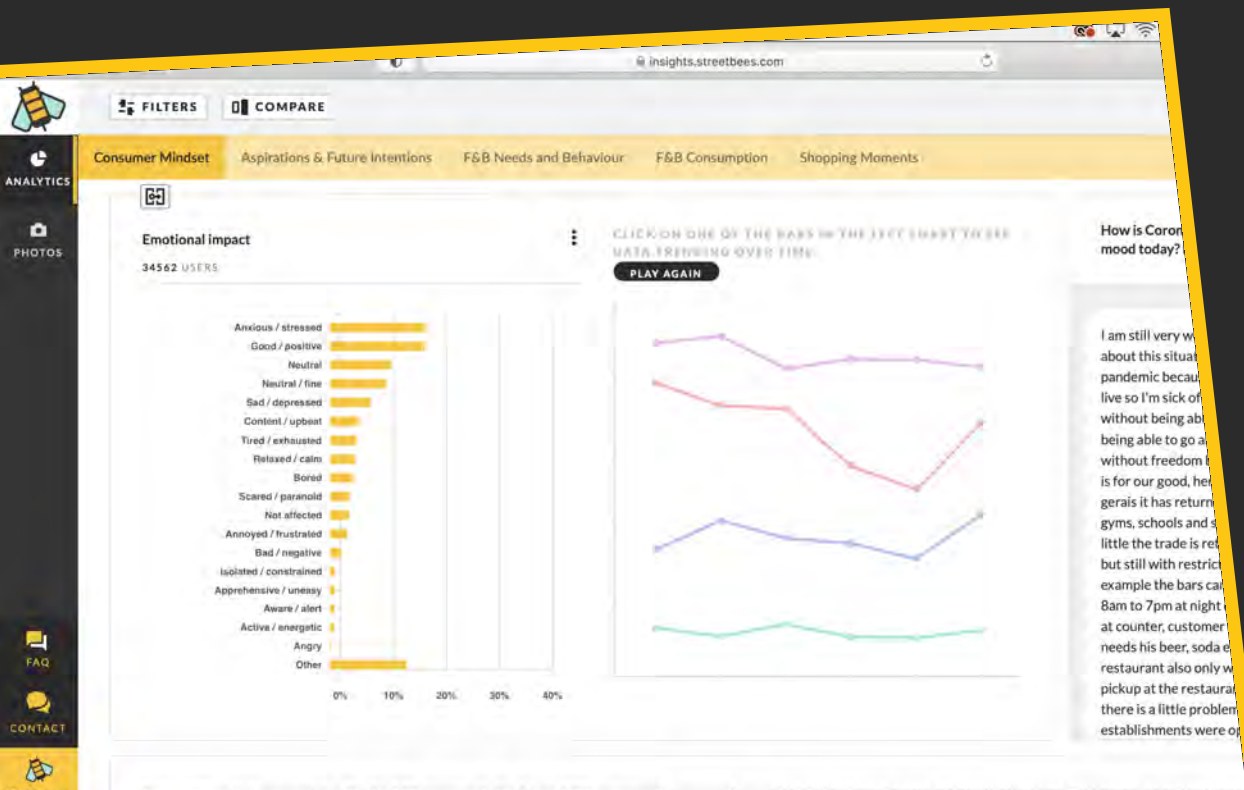
Faith Chaibva-King'ori, Strategy Insights and Analytics Director at Mondelēz International

Streetbees has been working with dozens of brands to uncover which are our priority consumer segments or target groups, and what tweaks can be made to them when we take into account their reaction to Covid. It's not about making changes to the brand philosophy, but to become more relevant.

Marketing is essential. Without speaking to consumers, it's impossible to get businesses out of the current situation.

What Streetbees Provides

- 1 Real, in-the-moment behaviour capturing full context and emotions
- 2 Consumers own words, analysed with advanced NLP to eliminate bias
- 3 Agility and proactiveness, uncovering opportunities to drive growth



If you're interested in learning more about how to build a strategy for your brand and the categories you operate in:

[BOOK A DEMO](#)





Streetbees helps the world's leading brands grow by building an Always ON connection with consumers.

Observe the moment of truth

Real life behaviour captured at the moment a consumer makes a decision. Never rely on claims.

Get close to consumers at scale

Access rich data with photos and videos from millions of demographically representative consumers.

AI driven growth

Streetbees identifies hidden growth opportunities by applying AI to millions of real life observations from real consumers.

3.5 Million

BEES

2.5 Billion

DATA POINTS

190

COUNTRIES

MARKET LEADING BRANDS USE STREETBEES TO UNLOCK GROWTH



L'ORÉAL®



MARS

BBC

GET IN TOUCH



Streetbees' Solutions



Dynamic Growth Engine



Brand Experience Monitor



Dynamic Media Landscape