

Techlash or Techlove?

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network

Connecting
beyond
the Crisis



Speed read:

The report in 5 minutes

The power of connection

The COVID-19 crisis is forcing us to re-evaluate our relationship with digital technologies as we embark upon a mass social experiment to live online. Consumption of digital media has rocketed in recent months, sparked by a desire to use technology to satisfy fundamental human needs to relax, connect with friends & family, to learn and to stay healthy.



Reversing the techlash?

However, this positive use of digital technologies takes place in the context of a longer-term backlash against how these technologies are often used and their wider impact on society.

For example:

- 57% of people today believe the pace of tech change is too fast (a level that has been consistent since 2018);
- Nearly half of the people we surveyed believe that digital technologies are increasing the inequality gap between rich and poor;
- Only around one third of people believe that emerging digital technologies such as Artificial Intelligence and robotics will create jobs in the future.

Could the response to COVID-19 present an opportunity for brands to reset and reframe how they use technology to build better relationships with consumers? Or will the techlash return with a vengeance?

People-tech trends in the new different

The challenge for brands is understanding how behaviours will endure beyond the immediate demands of the crisis and what might fall away over time.

Overall, there are a handful of trends related to brands' use of technology that we've identified that look set to shape the future beyond the crisis:



Post-digital privilege:

Living our lives online has led to a rapid scaling of digital investments and capabilities. This will condition consumer expectations for the foreseeable future towards digital by default as a core value proposition, as well as an increased appreciation of the link between digital access and improved life outcomes.



Digital DIY:

Consumers are using technology to become more self-sufficient and focused on self-investment across a whole range of hobbies and activities, enabled by brands who have pivoted towards empowerment and self-care.



The unified self:

The more time we spend online for work and pleasure, the more integrated consumer personas are becoming across different platforms and contexts.



Tech for good for all:

The current crisis has brought into sharp focus general awareness about how technologies can be harnessed by businesses and governments to deliver wider benefits for society. Today, two thirds of people expect organisations to use technology in a way that has a wider societal impact.



Every brand is a health brand:

Accentuated by the crisis but reflecting a longer-term shift in priorities, two thirds of people globally will expect future products and services to be designed in a way that enhances their health and well-being.



Recommendations

To address these shifts in expectation and help secure a longer-term shift from techlash to techlove, brands need to take a number of actions:

1. Create helpful experiences:

Pivot towards using technology in a way that is helpful in meeting fundamental human needs, in particular as it relates to our well-being as broadly understood: our need to be safe and healthy, to be connected with friends and family, to be productive and to learn.

2. Be available, not omnipresent:

Rethink personalisation strategies to be more empathetic and helpful to individuals. That means being more specific and context-driven in identifying the different points at which brands can make themselves available to help consumers.

3. Reinforce positive actions with positive messaging:

Develop messaging and campaigns that support individual health & well-being through ads that will often be consumed on digital media.

4. Explore the immersive potential of digital:

Use immersive technologies and interfaces (AR, gaming, voice) to understand how interaction with digital channels alters mood and emotional state, enabling brands to curate more positive customer experiences.

5. Marry increased commerce capability with brand-building:

To deliver a positive, human experience through digital channels, brands need to ensure that equal attention is paid between scaling ecommerce capabilities and building their brand in a way that appeals to consumers hungry for authentic, empathetic and personal engagement.

6. Increase online safety: With more people online and consuming digital media, the need has been heightened for brands to ensure the eradication of harmful content. Furthermore, with conspiracy theories and fake news abounding during the crisis, brands also need to work harder to find ways of demonstrating the veracity and credibility of their messaging.

7. Anticipate consumer needs:

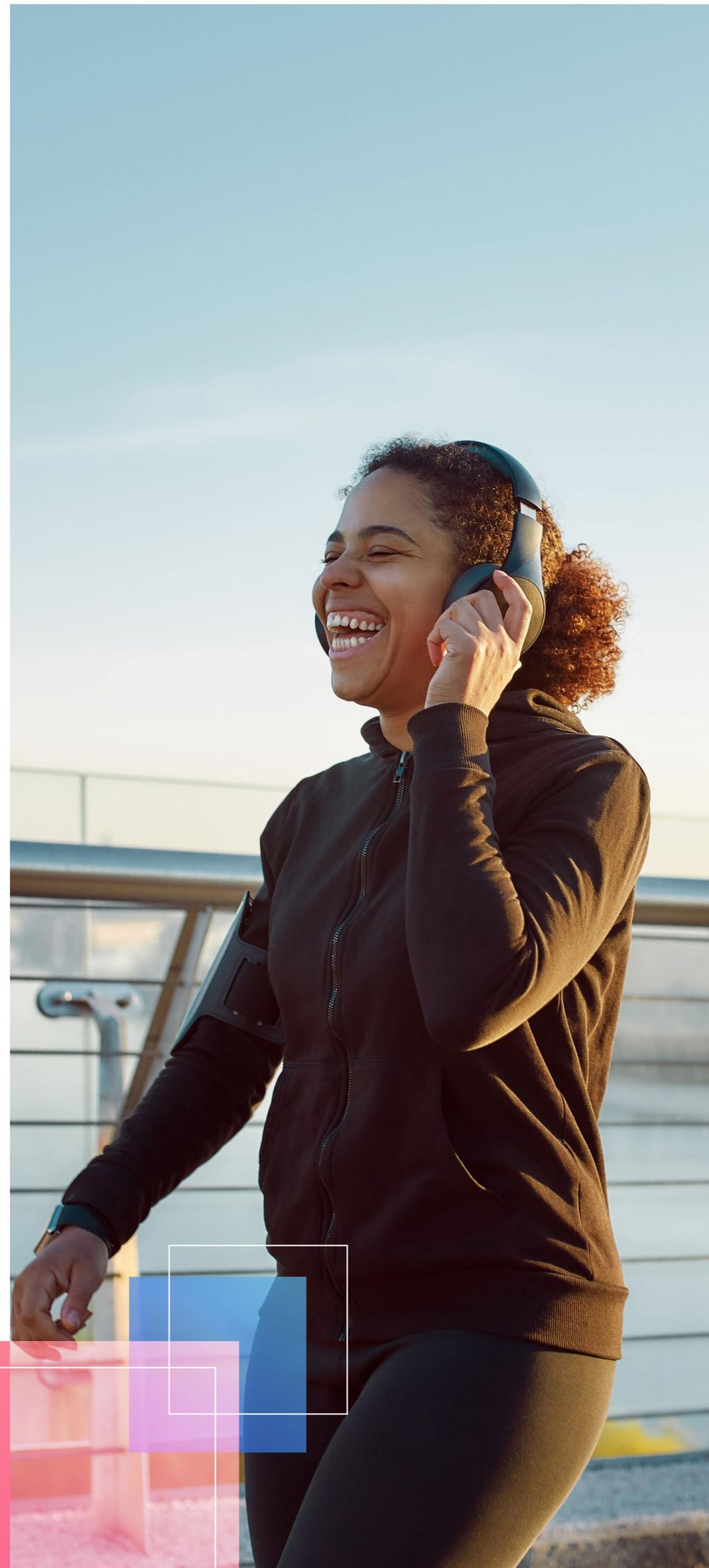
As brands look to reposition themselves as enablers of people's health goals, there is a key role for CRM capabilities that can predict key moments in consumers' lives where a brand could helpfully offer a relevant product or service.

Introduction

Could the COVID-19 crisis lead us to a more positive personal relationship with digital technologies—and what are the implications for brands?

These two questions sit at the heart of this paper, part of our multi-year research programme to understand how digital technologies are reshaping societies and meeting our fundamental human needs. Starting in 2018, we've been tracking how people the world over are responding to the digitisation of economies and industries, exploring themes such as trust, infrastructure, personal data and skills.

Today, in the midst of a global pandemic that is disrupting almost all facets of how we live and work, this research sheds new light on how people are using technology differently and what this could mean for brands in the longer term.





How we got here

The pre-COVID-19 era probably seems like a long time ago already. But it's fair to say that in many countries, our personal relationship with digital technologies has been problematic for some time. Whether it was smartphone use impacting family life or concerns around online safety and data security, technology has been on the receiving end of many negative headlines.

Fast forward to today and the picture looks very different. We're embarking on a mass social experiment with little precedent in modern history, where most people are reliant on digital technologies as a lifeline to the outside world.

Our survey of 32,000 people across 22 markets was conducted in March-April 2020, providing a snapshot of sentiment at the height of the crisis. Living through such seismic events will undoubtedly leave its mark on us all. But while the immediate, direct impacts of the crisis are certainly the most apparent, it's perhaps the indirect, longer-term impacts that will more subtly yet more significantly change the way we look at the world. Our understanding of our own well-being and our relationship with technology sits at the heart of these changes.

Life goes online

As well as the direct health and economic impacts, COVID-19 is leading to new consumer behaviours and responses the world over. Consumption of digital media, such as streaming services, social media sites and online collaboration platforms, has rocketed in recent months. Netflix added 15.8 million subscribers in the first quarter of 2020, more than double the 7.2 million that were expected—growth of more than 22 percent year-on-year.¹

Globally, people are now far more likely to engage with many digital products and services than they were last year (see Figure 1). For example, around three-quarters of people globally are now more likely to bank and shop online versus last year as necessity forces people onto online platforms.

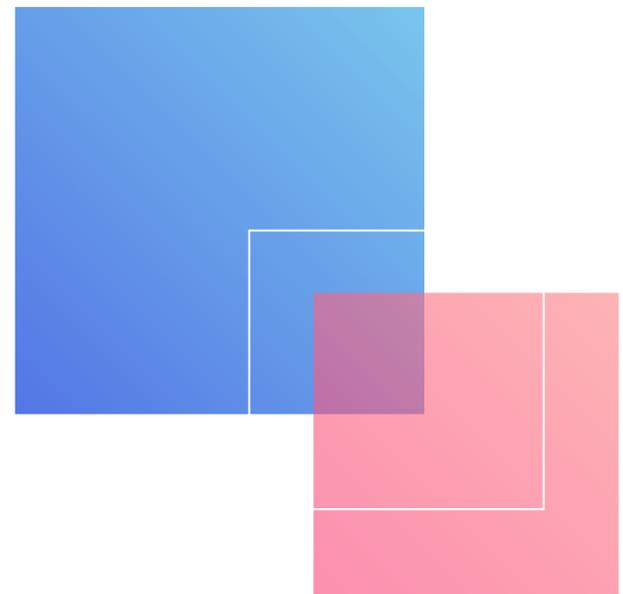
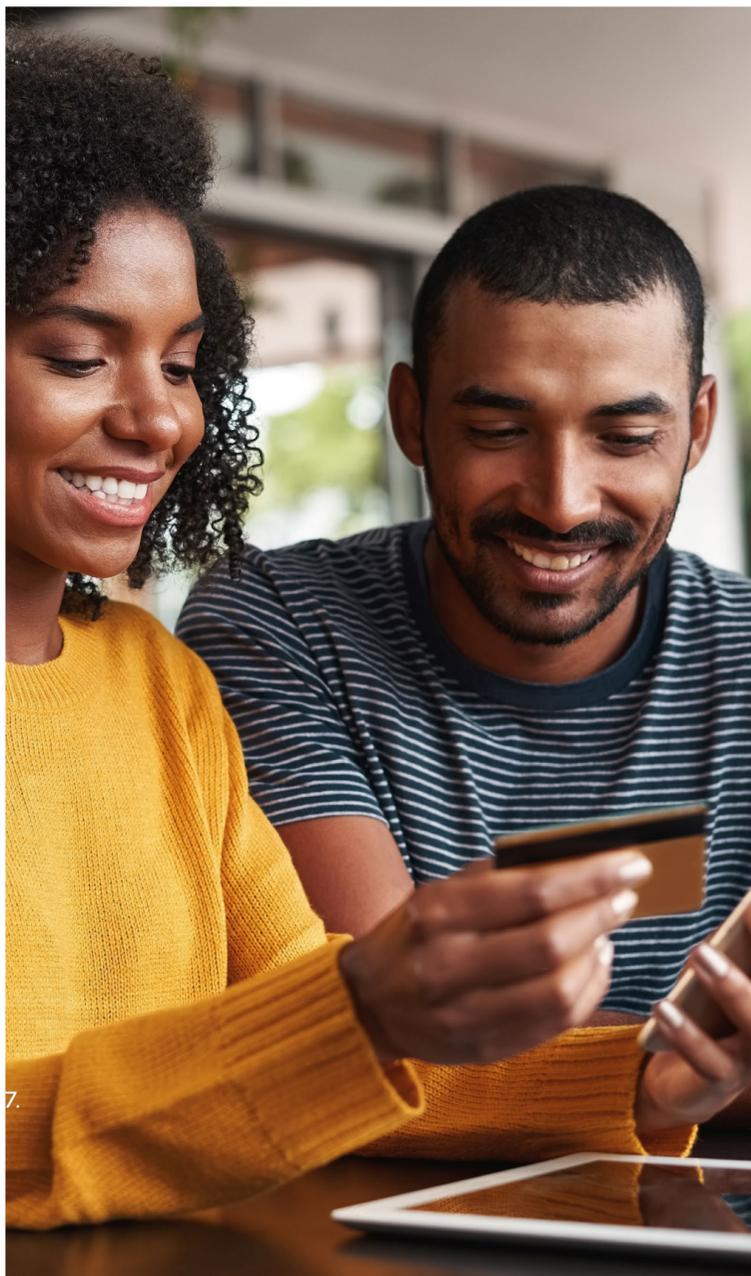


Figure 1: Likelihood of taking the following actions compared to last year



74%

Use an app to do my banking or manage my money



72%

Do my shopping online



72%

Listen to music via a streaming service



69%

Watch TV via a streaming service



49%

Use an app to take a taxi

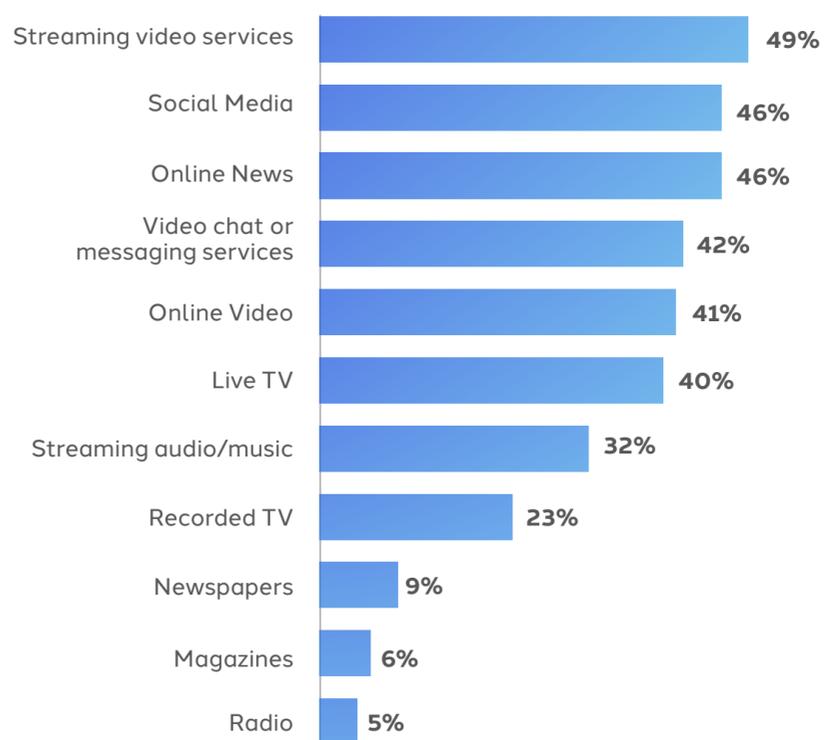
Source: Dentsu Aegis Network Digital Society Index Survey 2020

“Two-thirds of people aged 55-65 are now more likely to shop online”

The uptake of digital services is seen among older people too. Two-thirds of people aged 55-65 are now more likely to shop online, while around 6 out of 10 in this age bracket are also more likely to listen to music via a streaming service (such as Spotify or YouTube) or stream TV e.g. on Netflix, Amazon Prime, Hulu, etc.

At a country level, our weekly analysis of consumer habits in the United States shows a net increase of nearly 50 percentage points of people spending more time on video streaming services, social media and online news, registered in the first week of April (see Figure 2). While our subsequent analysis suggests that this period was probably a peak of media consumption, it nevertheless demonstrates the rapid and significant growth in the use of digital media.

Figure 2: Net increase/decrease in media use compared to normal in the United States (percentage points)



Source: Dentsu Aegis Network Crisis Navigator survey; data collected 3-4 April 2020

The power of connection

Within a context of huge increases in online consumption, personal use of technology is seen as overwhelmingly positive in terms of its specific impacts on well-being. Out of a list of potential impacts with an even number of both positive and negative outcomes, the top choices globally are all positive (see Figure 3).

Figure 3: Most commonly cited impacts of personal tech use on health & well-being

1. I feel more engaged with friends, family and the world around me
2. Using technology enables me to relax/experience pleasure
3. I'm learning new skills/new knowledge
4. I'm monitoring and looking after my health
5. I feel more mentally stressed/find it hard to switch off
6. I suffer from physical health issues (e.g. repetitive strain injuries)
7. My relationships with other people have deteriorated
8. I have experienced online bullying

Source: Dentsu Aegis Network Digital Society Index Survey 2020





At this time of crisis, people are understandably focusing on how technology can deliver their human needs for pleasure, connection and discovery—finding virtual succour when physical avenues are closed, such as streaming the latest Netflix blockbuster or meeting friends for a virtual cocktail.

Priorities vary by age, though. For example, people in the oldest age group we surveyed (55-65 years) ranked the ability to feel more engaged with friends, family and the world around them as the number 1 impact of their use of technology. In the context of lockdowns, but also longer-term concern about social isolation and loneliness among older people, this underlines the important role that technologies such as voice-enabled smart speakers can play in keeping us connected with potentially vulnerable populations.

For younger people, the priority is on learning new skills, either as a substitute for physical learning or in order to adapt to a rapidly changing workforce. Both of the youngest cohorts we surveyed (18-24 and 25-34 years) cited education as the number 1 impact of their personal technology use.

How brands are supporting well-being through tech

Across the full spectrum of factors that can impact our sense of health and well-being (see Figure 4), in the current crisis technology is playing a critical role. For example, two-thirds of people (and particularly the elderly) believe physical health is the #1 driver of health & well-being.

Understandable, of course, given the tens of thousands of lives that have already been claimed by the virus and the overriding anxiety felt by people young and old looking to isolate themselves against contagion.

Brands are responding directly through the increased development and sale of remote health diagnostics, as well as an explosion in content aimed at helping people stay healthy. For example, in the UK, fitness guru Joe Wicks runs an online class at 9am every weekday to help kids (and adults) get moving.ⁱⁱ

In the US, Nike dropped its subscription fee to its NTC Premium service enabling customers there to stream its workout videos and training programmes for free.ⁱⁱⁱ

The second most important driver of health and well-being is relationships with friends & family. At a time of crisis—and reflecting the nature of the virus itself—people the world over have looked to their loved ones for comfort and protection. This is particularly acute among women, where there is a significant gap between the male (52%) and female (60%) responses to this question. A number of brands are leaning into this trend, with Diageo offering a range of online virtual cocktail classes to help people enjoy a social drink at home.^{iv} In the UK, to coincide with the early May public holiday, Bud Light hosted an England football pub quiz featuring past and present players on the brand's YouTube and Facebook channels.^v

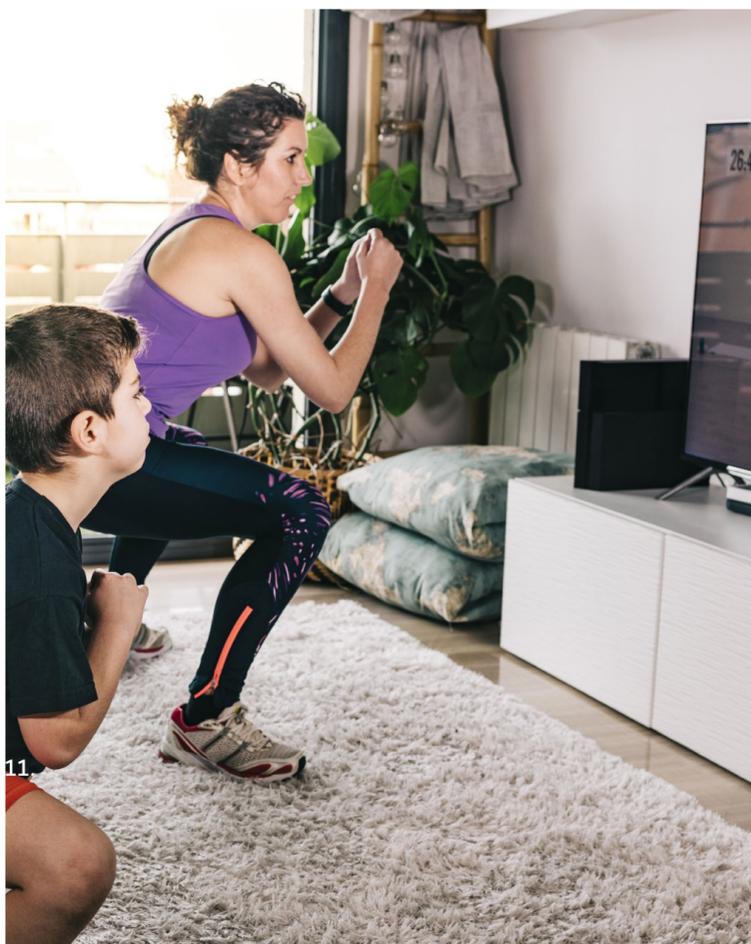
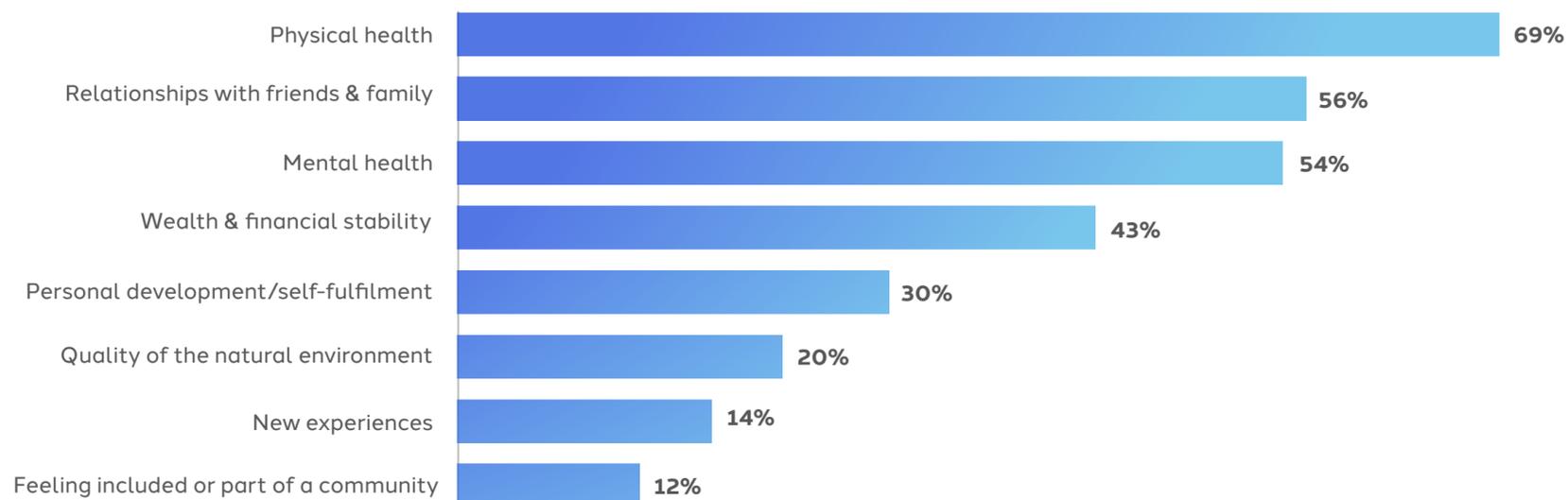


Figure 4: Key factors driving people's sense of health & well-being

Which, if any, of the following do you think is the most important to your own sense of well-being? (% ranking in top 3)



Source: Dentsu Aegis Network Digital Society Index Survey 2020

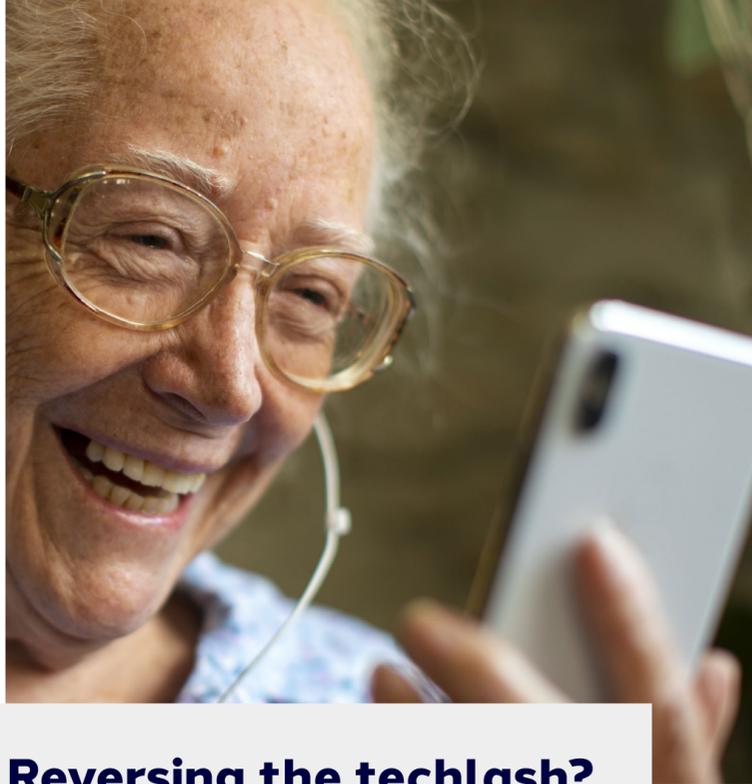
In terms of aiding mental health, the third most important factor identified in our survey, a number of brands are using technology to help people stay well during the crisis. For example, Snap has rolled out the 'Here For You' search tool to help users who may be feeling anxious or stressed over the coronavirus pandemic. It's designed to surface 'safety resources' from mental health experts when users search for topics like depression, anxiety or suicide.^{vi} Similarly, lifestyle brand FabFitFun has taken its streaming platform out from behind a paywall, giving anyone free access to a whole range of content that support good mental health such as meditation guides and cooking videos.^{vii} Meditation app Headspace has also given free subscriptions to healthcare professionals and unemployed people, helping them access support at a time of high stress.^{viii}

As the bow-wave of the pandemic subsides and the world feels the squeeze of a deep recession, it's likely

we'll see financial concerns become more prominent. Brands will then have an opportunity to identify and deliver ways that support the economic well-being of their customers, whether directly (e.g. through discounts or low-cost product ranges) or indirectly (e.g. by offering skills and talent development programmes).

There are some exceptions to the global pattern observed above. For example, in Brazil mental health is the #1 driver of health & well-being overall—perhaps reflecting the relatively nascent state of COVID-19 in that market at the time of our survey, or perhaps a more holistic understanding of well-being in that country.

In Hong Kong, a higher proportion of people (62%) believe that wealth and financial stability is more important than mental health (41%), perhaps reflecting how concern turned from the initial impact of the virus to its second order impact on the economy.



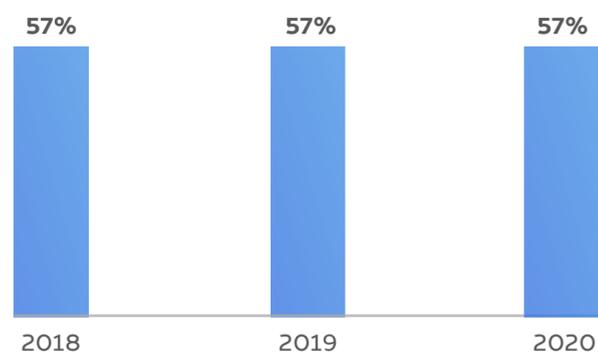
Reversing the techlash?

Our new-found reliance on digital technologies and digital media to work, stay connected and learn comes against a longer-term trend over the last few years of a ‘techlash’—a broad-based anxiety about the impact of technology on society (e.g. through potential automation), the role of Big Tech and the impact of technology on our own daily lives through, for example, excessive smartphone use impacting family life, gaming and digital addiction.

We’ve been studying these trends for the last three years and our evidence shows a consistent pattern of concern around the impact of digital technologies on society.

Figure 5: More than half of people believe the pace of tech change is too fast (2018-2020)

The pace of technological change is too fast today (% agreeing)



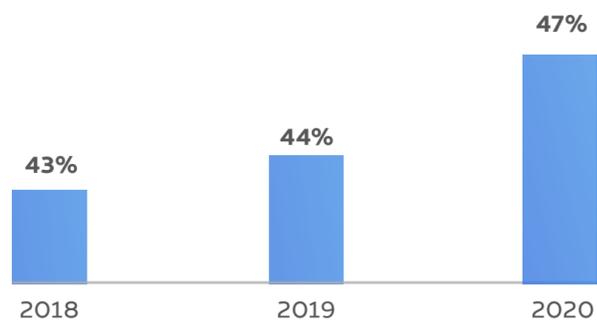
Source: Dentsu Aegis Network Digital Society Index Survey 2018-2020

For example, 57% believe the pace of technological change is too fast today, a pattern seen consistently over the last three years as people feel a sense of disempowerment and lack of agency over one of the most powerful trends reshaping how we live and work (see Figure 5). This is felt most acutely in emerging economies, where rapid uptake of digital technologies is also accompanied by concerns about its impact on society and ways of living. However, in some developed markets, the trend is reversed: while 72% of people in Japan believed the pace of tech change was too fast in 2019, that falls to less than half (47%) in 2020. In terms of age, counter-intuitively we find millennials agree as much as older people that the pace of tech change is too fast.

Nearly half of the people we surveyed believe digital technologies have made society more unequal in terms of the gap between rich and poor. This share has grown steadily over the last three years (see Figure 6), reflecting a growing skills-based digital divide and unease with the wealth and power of Big Tech alongside the potential to take jobs away from lower-skilled workers.

Figure 6: A growing share of people believe digital technologies have increased inequality

Digital technologies have made society more unequal in terms of the gap between rich & poor (% agreeing)

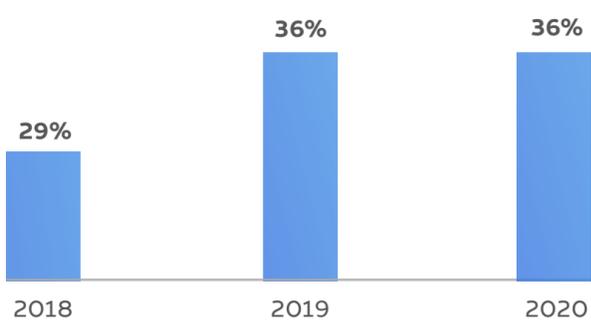


Source: Dentsu Aegis Network Digital Society Index Survey 2018-2020

Reflecting this concern around the impact on employment, only one third of people believe that emerging digital technologies, such as Artificial Intelligence and robotics, will create career opportunities in the next 5-10 years. This proportion has increased slightly over the last three years, signally a potential increase in optimism about the ability of these technologies to drive new growth opportunities (see Figure 7), but still remains low.

Figure 7: Only around one third of people globally believe AI and robotics will grow jobs

Emerging digital technologies, such as AI & robotics, will create career opportunities in the next 5-10 years (% agreeing)

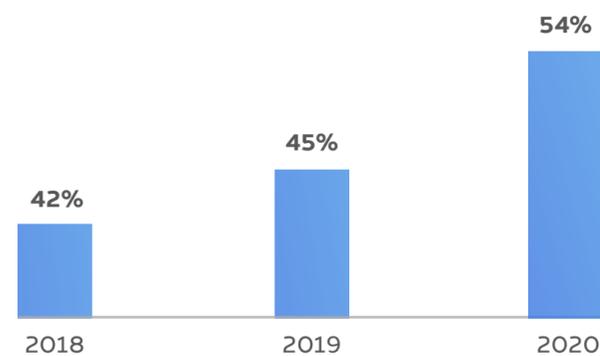


Source: Dentsu Aegis Network Digital Society Index Survey 2018-2020

A further sign that the techlash may be reversing is provided by peoples' views on the role of technology in addressing societal challenges—such as health issues, poverty and environment degradation. The current crisis appears to have brought the potential of digital to the forefront of peoples' minds, with a growing proportion believing it can address societal issues (see Figure 8). In some markets this is particularly acute—in Spain, for example, 59% of people are optimistic that digital technology will help solve some of the world's most pressing challenges, up from 35% last year.

Figure 8: A growing share of people believe in tech's potential to solve societal challenges

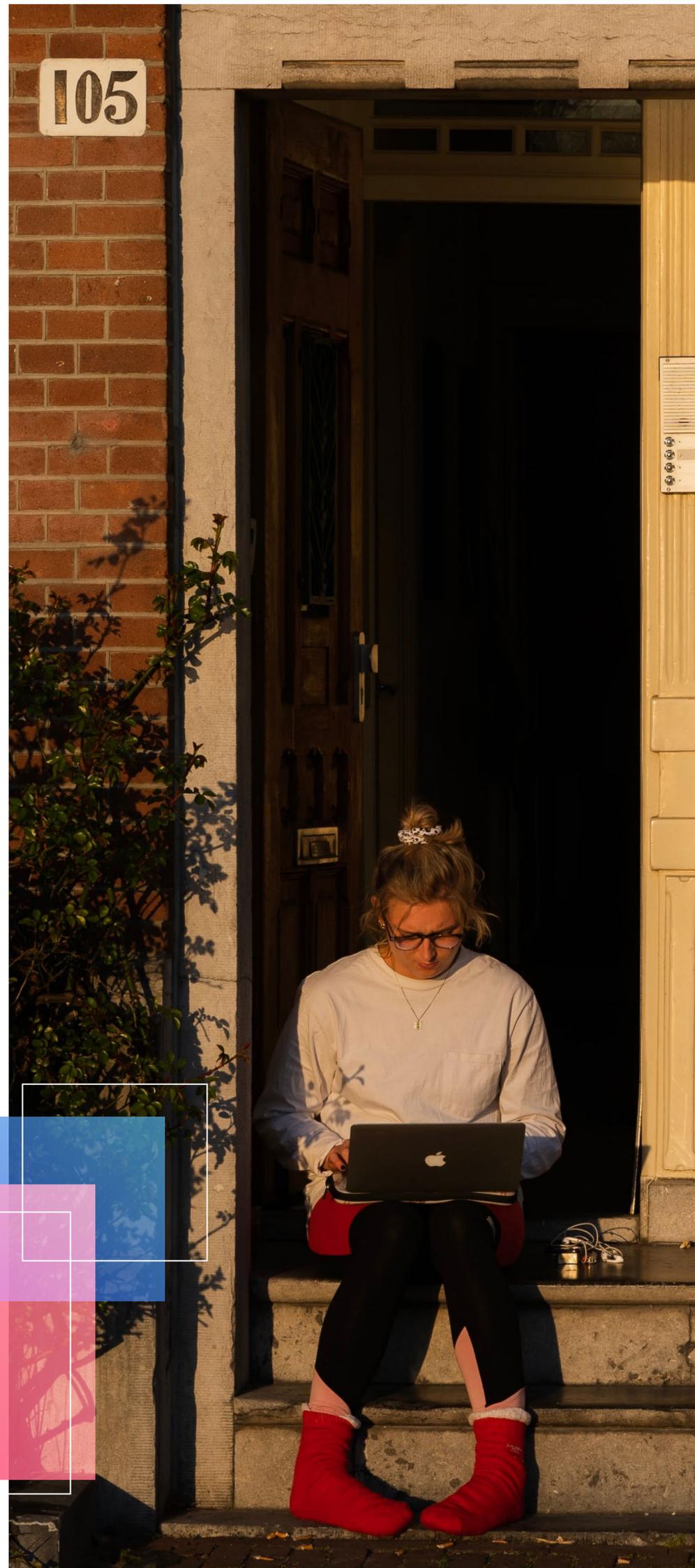
I am optimistic that digital technology will help solve the world's most pressing challenges e.g. poverty, health issues, environmental degradation (% agreeing)



Source: Dentsu Aegis Network Digital Society Index Survey 2018-2020

People-tech brands in the new different

So are we embracing a new era of techlove? Or will we soon return to the age of techlash? The answer for brands rests on the extent to which our more positive relationship with digital technologies will endure beyond the crisis. Out of necessity, we've been forced to use digital technologies to live, work and stay happy. But once restrictions on movement are lifted, will we reappraise our relationship with technology once again? While a number of uncertainties and potential disruptions remain, there are a handful of trends that seem set to endure for the foreseeable future.





Post-digital privilege

With so many people going online by default almost overnight, consumer expectations of a brand's digital capabilities are only increasing. A lot of brands have had to catch up quickly in terms of their digital strategies and investments. For many this has meant rapidly building an ecommerce capability, but more broadly brands will need to rethink and update how they communicate and offer engaging experiences with consumers through primarily digital channels.

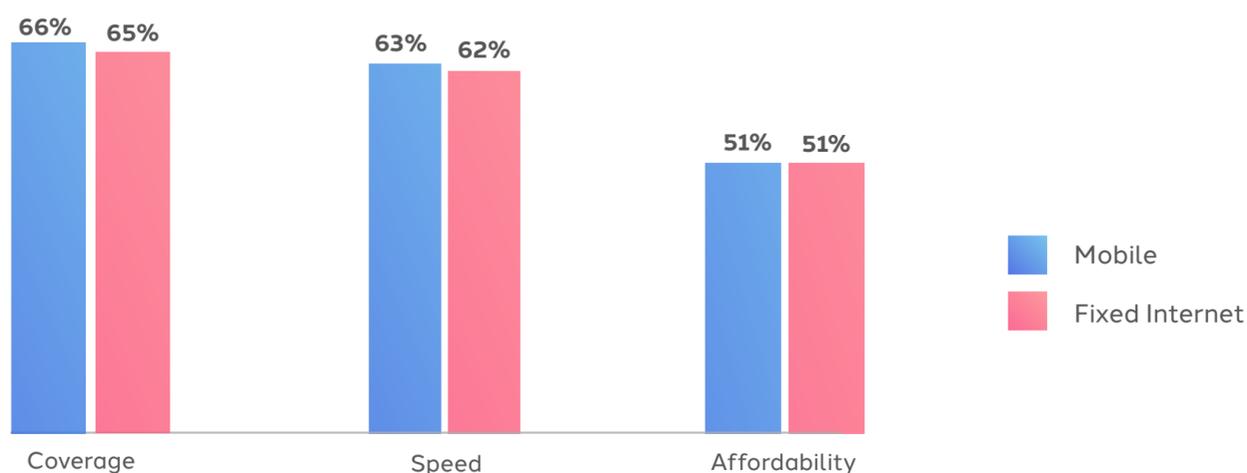
We're also likely to see issues of digital access increase in importance and value in the eyes of consumers. Access to the internet and wider digital products and services has always been associated with improved life chances and outcomes across a range of socio-economic factors. But as we move into a post-digital world – where we cease to think of digital channels and environments as distinct from the physical world – this trend is likely to be exacerbated. We've already seen a huge amount of helpful

content go online for free, such as the National Theatre in the UK streaming free productions^x and Audible's offer of hundreds of free audiobooks for children and students to support their at-home learning.^x But basic access to the internet is needed to access these services and points to the wider challenges of ensuring everyone is able to live their lives fully and productively with the aid of digital technologies.

In terms of access, our analysis shows that the majority of people we surveyed globally are satisfied with their mobile and internet services at this moment in time (see Figure 9). Around two-thirds of people globally believe their mobile and fixed internet services are high quality in terms of coverage and speed. However, only half of people globally believe the same in terms of affordability, sounding a note of caution in the context of an economic recession and reduction in consumer spending. How can brands ensure that their digital products and service are as inclusive as possible?

Figure 9: People are generally positive about the quality of digital infrastructure in their country, but affordability is a concern

% of people rating their mobile & fixed internet services as good or excellent in terms of....



Source: Dentsu Aegis Network Digital Society Index Survey 2020



Digital DIY

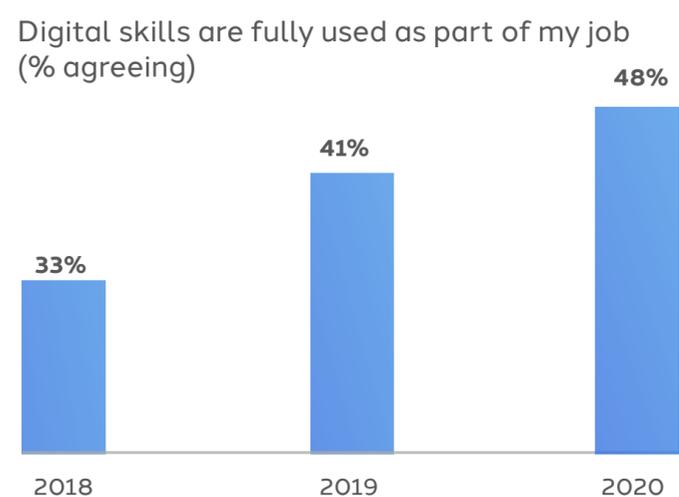
With most people housebound, many consumers are using technology to take on new analogue hobbies and craft activities to keep busy and happy. Cooking, baking, home improvement and gardening have all seen a big uptick as people become more self-sufficient. With work and education also often taking place in the home, where people live is now a powerful unit of self-investment in terms of both time and money.

This has meant that many brands have had to pivot their relationship with consumers, often enabled by technology, from direction provision to indirect support. For example, a number of ‘secret’ recipes have also been revealed as brands try to help people recreate their favourite foods at home—for example, IKEA revealed the recipe to its iconic Swedish meatballs.^{xi} Many cosmetics brands have now had to shift their offer to consumers towards self-care, providing advice and information on how to maintain skincare during lockdown through online tutorials and consultations. Despite coronavirus shutdowns, personal care and cosmetics brand Estée Lauder has seen its online business grow by double digits in its third quarter for the 2020 fiscal year, its CEO Fabrizio Freda attributing success to consumers’ desire to address health and wellness at home during lockdown.^{xii}

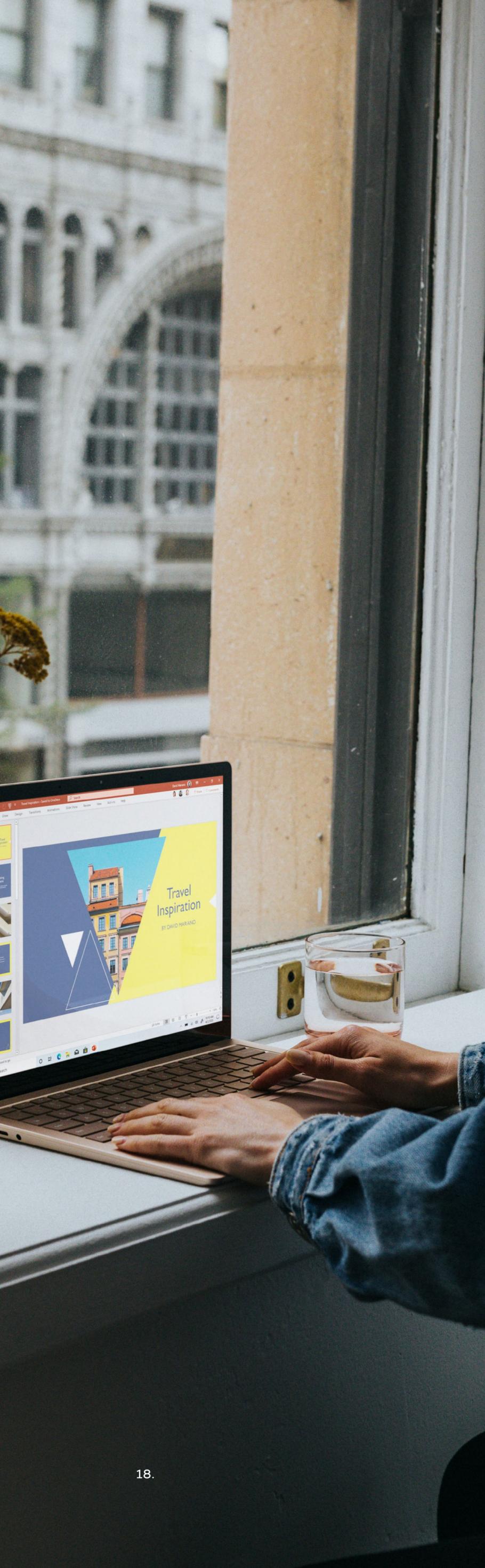
“ People are utilising more fully their digital skills in the workplace, increasing from one third in 2018 to nearly half in 2020 ”

Furthermore, as people continue to work from home, the need for on-the-job training and online education will become even more critical—especially for people who may need to transition into new roles. Our analysis over the last three years shows that people are utilising more fully their digital skills in the workplace, increasing from one third in 2018 to nearly half in 2020 (see Figure 10). Again, the emphasis will need to be on using technology to empower people, helping them to upskill in key areas and cementing a mindset of self-investment in personal and professional development. Many brands are starting to take action here. For example, Adobe is providing free in-home access to the Adobe Creative Cloud to higher education institutions.^{xiii} Companies like Microsoft and Google have also opened up the availability of their remote learning tools to schools and are offering support to teachers and students to help them use the resources.^{xiv}

Figure 10: Workplace utilisation of digital skills is increasing



Source: Dentsu Aegis Network Digital Society Index Survey 2018-2020



The unified self

One impact of lockdown has been a further blurring of the boundaries between the physical and digital spheres. This has occurred perhaps most obviously in the context of the lines between work-life and homelife becoming increasingly indistinct. But we are also seeing growing integration between the two realms in the way we shop and the way we project ourselves online.

For example, in February 2020, UK retailer John Lewis launched a virtual reality application on its website so that customers could more easily visualise sofas in their own homes.^{xv} Over the following weeks, and in the absence of being able to visit the store, the store came to the customers.

Similarly, we're also seeing a shift in how we project ourselves online. This may be as simple as things like changing backgrounds in Zoom meetings. But it is also increasingly sophisticated with new tech-enabled services enabling people to keep up with the latest fashions but without having to visit a store or even purchase a physical piece of clothing. For example, digital clothes such as those developed by Swedish clothing retailer Carlings are becoming increasingly popular and look set to continue while people remain wary about visiting the high street.^{xvi} They're also more sustainable, of course—an important brand value for younger, more image-conscious consumers.



Tech for good for all

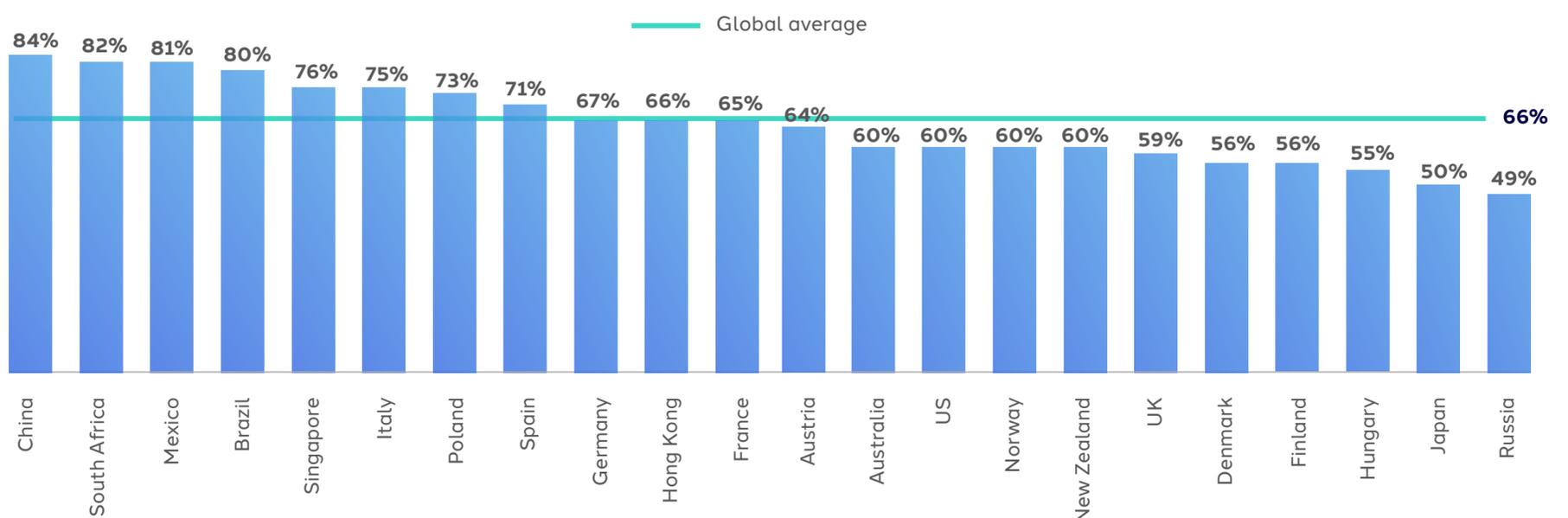
For some years, popular awareness has grown about how digital technologies can be harnessed by businesses and governments to deliver wider benefits for society. The focus on ‘tech for good’ recognises both the need to address some of the unintended consequence of digitalisation on inequality, but also acknowledges the huge transformative potential of technology for a myriad of economic, environment and social issues. Today, two-thirds of people expect organisations to use technology in

a way that has a wider societal impact. And in some emerging economies, that belief is particularly acute. For example, more than 80% of the people we surveyed in China, South Africa, Brazil and Mexico share this view (see Figure 11).

This will bring new expectations on brands to use their digital assets at their disposal for social benefit, which with the threat of a global recession emerging may well prove essential to help societies continue to thrive.

Figure 11: The majority of people globally believe that organisations should use technology to benefit society

In the future (i.e. next 5 to 10 years) I will expect organisations to use technology in way that has a wider positive societal impact (% agreeing)



Source: Dentsu Aegis Network Digital Society Index Survey 2020



Every brand is a health brand

The crisis has seen brands responding to peoples' needs in ways they probably never envisaged. From developing online education tools to help home-schooling or to providing virtual communities and environments for people to socialise, many brands have become more helpful and integral to the way people live.

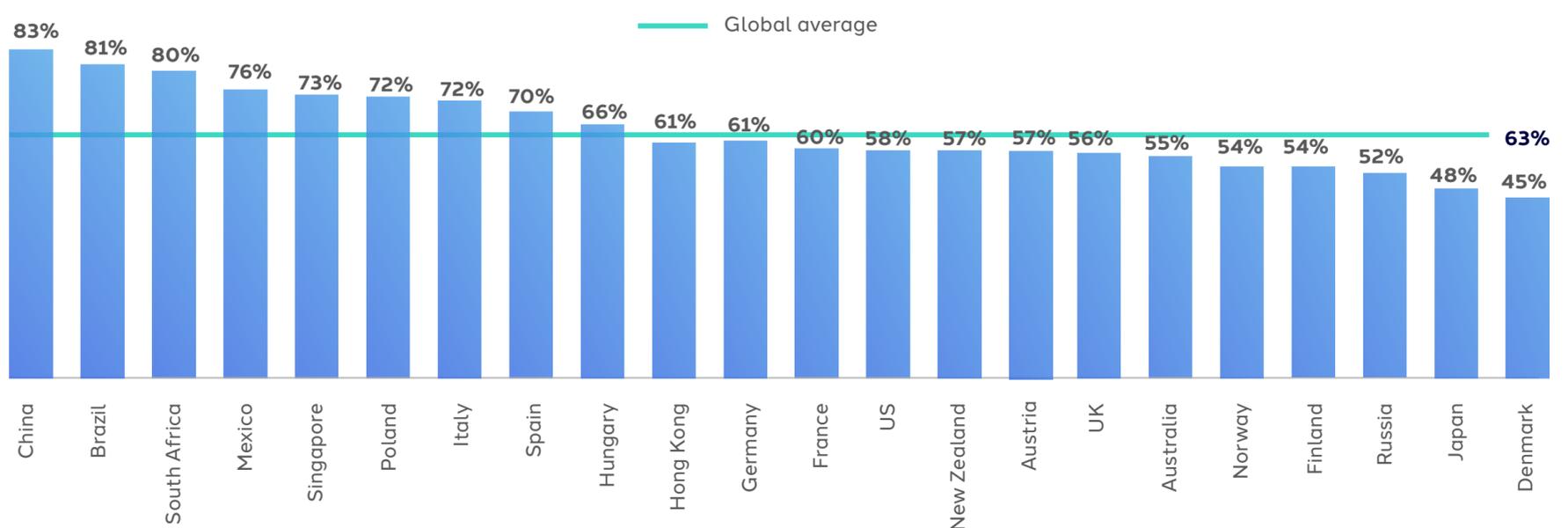
At the same time, the experience of living through a global pandemic will for many people lead to even greater focus on their health and well-being as the primary objective of life, creating an opportunity for brands to be part of that process. As we emerge from the lockdown, the combination of changed consumer expectations as well as the evidence of many brands acting in new ways to meet consumer needs will change the competitive landscape. Our survey shows that in the future a resounding two-thirds

of people globally will expect future products and services to be designed in a way that enhances their health and well-being (see Figure 12).

Given the circumstances in which lockdowns are likely to be lifted gradually, and people's reticence to visit public places for some time to come, many of these health interventions will need to be delivered via digital technologies. The growth in remote diagnostics and home-health analytics is a clear source of growth for the health and well-being sector itself, but for brands more broadly there is an opportunity to pivot towards a value proposition that seeks to address people's fundamental human needs at this time, particularly in terms of physical and mental well-being.

Figure 12: Expectations of products and services that enhance health & well-being

In the future (i.e. next 5 to 10 years) I will expect products & services to be designed in a way that enhances my health and well-being (% agreeing)



Source: Dentsu Aegis Network Digital Society Index Survey 2020

Recommendations

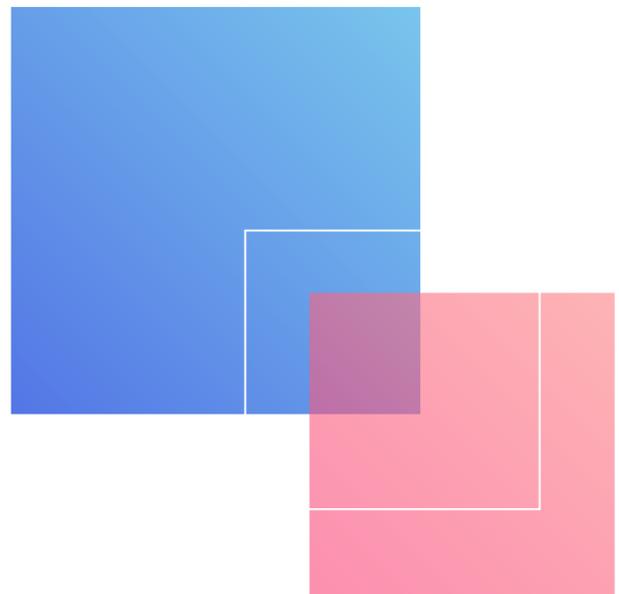
Whatever your sector or segment, in the future brands will be expected to play an integral role in helping people staying happy and healthy. How they engage with consumers through digital technologies provides a powerful lever to deliver on this objective.

So how can brands ensure that their use of digital technologies supports consumer well-being, securing a long-term shift from ‘techlash’ to ‘techlove’?

Here’s our top recommendations:



21.



1.

Create helpful experiences

The COVID-19 crisis requires brands to pivot towards using technology in a way that is helpful in meeting fundamental human needs, in particular as it relates to our well-being as broadly understood: our need to be safe and healthy, to be connected with friends and family, to be productive and to learn. That’s a lens that for many brands has proven straightforward—for example, Lego working with the UK government to develop a public service announcement encouraging children to stay at home and save lives over the Easter break ^{xvii}, or LVMH pivoting towards the production of hand sanitiser rather than perfume bottles.^{xviii} But, equally, it will be challenging for brands who are less clear on how their actions are helping consumers. What is clear is that brands need to shift from thinking about selling more products to meeting fundamental needs, which ultimately will realise more value over the full consumer lifetime.



Be available, not omnipresent

Brands need to shift their approach to how they reach people. We've talked about targeting for a while. We then talked about engagement. Neither strategy has led to wholly positive responses from consumers.

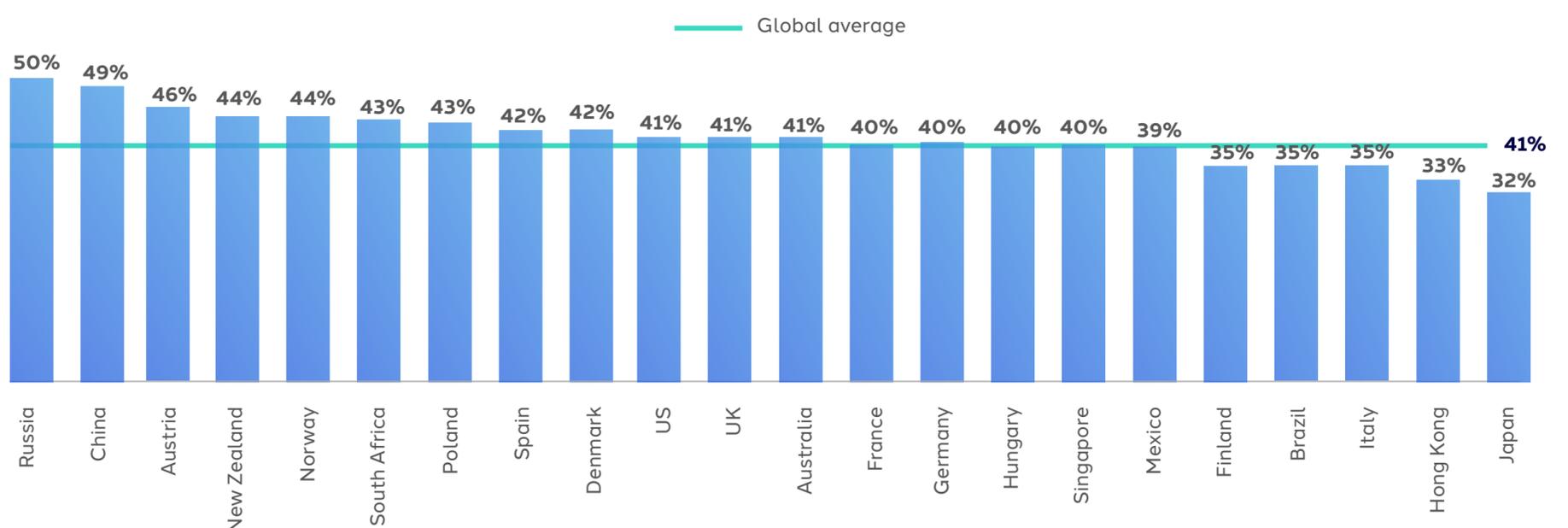
Today, 4 out of 10 people find it intrusive when they are served personalised ads online (see Figure 13). If brands are going to cultivate people's positive engagement with digital media in particular, they need to rethink personalisation strategies to be more empathetic and helpful to individuals. That means being more specific and context-driven in identifying

the full range of points at which brands can make themselves available to help consumers.

In March, Vodafone announced it was offering free unlimited mobile data to half a million of its pay monthly customers.^{xix} Tailoring its approach for those most in need, the UK telco provider has proactively upgraded NHS staff workers and 'vulnerable' customers (e.g. those with declared disabilities or mental health issues) to the scheme for the next six months. Another half a million customers can apply for the scheme via the company's app.^{xx}

Figure 13: Four out of ten people globally think personalised ads online are intrusive

I find it intrusive when I'm served personalised ads online (% agreeing)



Source: Dentsu Aegis Network Digital Society Index Survey 2020

3.

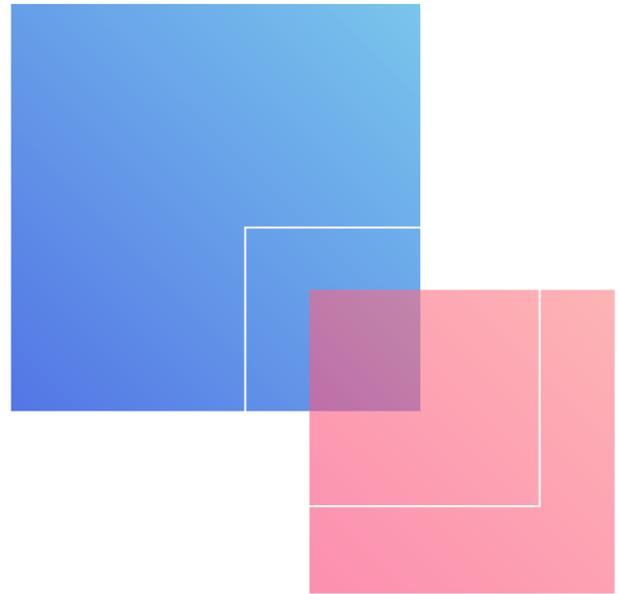
Reinforce positive actions with positive messaging

Brands from all sectors should look at how they can develop messaging and campaigns that support individual health & well-being through ads that will often be consumed on digital media. According to our survey, only a quarter of people globally say they live a healthier lifestyle as a result of the information, products or services they find in ads. This requires brands to reconsider what they are marketing (as per point 1 above), but also how they do so.

For example, Microsoft's Xbox Adaptive Controller brought gaming to people with a range of physical disabilities for the first time.^{xxi} Winning last year's Cannes Grand Prix for Brand Experience & Activation, the company demonstrated inclusivity not only within its product development but also its marketing. Its campaign included YouTube instructional videos, a SuperBowl TV spot and an e-sports tournament for gamers of all abilities that garnered 1.1 billion impressions.^{xxii}



23.



4.

Maximise the immersive potential of digital

As the sophistication of digital media grows, we are able to access a whole new set of insights about how people are feeling when they interact with these channels. As we move beyond the crisis, understanding how consumers' emotional needs are changing will be core to a modern CRM proposition. Brands increasingly will need to look at how they can use more immersive technologies (AR in particular), gaming and voice, for example, to understand how interaction with digital channels alters mood and emotional state, enabling them to curate more positive customer experiences.

This year, UK personal care brand Lynx is celebrating its 25th anniversary of its popular Africa fragrance with a creative TV campaign taking viewers through twenty-five years of British teen culture.^{xxiii} To spark nostalgia and uplift its customers during lockdown, customers will be able to download an augmented reality version of the advert via a Snapcode on its limited-edition range products.^{xxiv}



5.

Marry increased commerce capability with brand-building

While many brands are by necessity building increased ecommerce capabilities and services, the risk is that this leads to a reliance on functional factors (such as cost and utility) through which they appeal to consumers. However, in order to differentiate themselves and deliver a positive, human experience through digital channels, brands need to ensure that equal attention is paid to building their brand in a way that appeals to consumers hungry for authentic, empathetic and personal engagement.

Not only has beauty brand NuFace reduced barriers for purchase online by offering its customers free shipping during the crisis, the company is also successfully building its brand by creating digital content to resonate with its consumers.^{xxv} Rather than pushing its own products, NuFace surveys its Instagram viewers on what type of content they would like to see and responds 'in hours' with appropriate content. Consequently, its views on Instagram Stories are up by 30% and likes and comments on its Instagram posts are up by 20%.^{xxvi}

6.

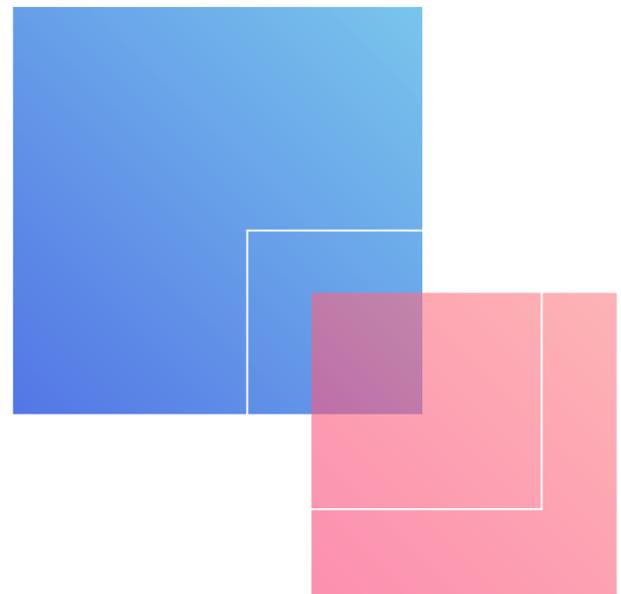
Increase online safety

This has been a challenge for marketers for many years. But with more people online and consuming digital media, the need has been heightened for brands to ensure the eradication of harmful content. Furthermore, with conspiracy theories and fake news abounding during the crisis, brands also need to work harder to find ways of demonstrating the veracity and credibility of their messaging.

In January of this year, Mars, P&G, Adidas, Lego and Unilever, as well as Google and Facebook, outlined a plan for preventing the spread of harmful content online.^{xxvii} Its objectives include developing tools that allow brands and media agencies to take better control of where their media spend is attributed and creating a set of measurement standards so marketers can assess their ability to block, demonetise and remove harmful posts and videos.



25.



7.

Anticipate consumer needs

As brands look to reposition themselves as enablers of people's health goals, there is a key role for CRM capabilities that can predict key moments in consumers' lives where a brand could helpfully offer a relevant product or service. Alibaba uses AI to provide customers with a superior customer experience.

The e-commerce platform uses deep learning and natural language processing to recommend products to shoppers, and has created an AI-powered chatbot that can understand customers' emotions and alert human customer service agents to intervene if necessary.^{xxviii} To support people's health during the crisis, the company has trialled its new AI coronavirus diagnosis software with 5,000 patients in China that claims to be around 60 times faster than human detection and has been presented to healthcare workers in Europe.^{xxix}



Conclusion

The forced social experiment of COVID-19 has forced us to re-evaluate our relationship with technology. It presents an opportunity for brands to reset how they interact with people through digital channels—but also increased expectations about how they interact with their consumers in the future.

Central to brands' response must be a renewed focus on the total customer experience, bringing together marketing, sales and service in a truly integrated way. That requires a philosophical shift from selling in specific channels, to meeting customer needs and expectations wherever they may exist.

Overall, the opportunity for brands is to develop more human, empathetic relationships with consumers through the way they use technology. This was always the promise of the digital revolution to the world of marketing. It may be that it has now taken another kind of disruption to make it real.

Acknowledgements

We would like to thank our many colleagues who have been involved in the development of this report from all parts of the business.

At the risk of missing someone out, special thanks go to the subject matter experts who have shaped this report:

- **Tia Castagno** (Vizeum)
- **Simon Gill** (Isobar)
- **Sean Healy** (Carat)
- **Richard Lees** (Merkle)
- **Anna Lungley**
(Dentsu Aegis Network)
- **Sanjay Nazerali** (dentsu X)
- **Paul Wilson** (Vizeum)
- **Jennifer Zimmerman**
(dentsumcgarrybowen).





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For more information on this report please contact:

Tim Cooper

Global Head of Strategic Communications

tim.cooper@dentsuaegis.com

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