How to be sure
(when you can’t be sure of anything)

A letter from forsun & bodenfors to brand leaders as they navigate COVID-19
If you’re like most brand leaders, your mailbox is probably full of prophecies and predictions, contradictory opinion polls, outdated surveys, triumphant case studies, frightening cautionary tales — ream upon ream upon ream of information.

Everything, in fact, except a clear answer to the question everybody’s probably asking you: **How should we react to COVID-19?**

We say: **Don’t.**
What you’ll find in this handy little document.

01 Brand resilience exposed
Unpacking the landscape of brands and their reactions to the global pandemic. Why can some brands adapt to changing tides better than others?

02 The stats that say it all
Understanding the opportunity costs of brand silence and the business case for continuing marketing efforts during economic downturns. How can brand managers help build the case to the rest of the organization?

03 Shifts in the cultural current
Highlighting the attitudes and actions that will impact the way brands show up in the world, strike up relationships with people, and build a more resilient brand for the future. What are main things brands need to consider now?

04 Where to go from here
Uncovering the steps brand managers need to take to create a roadmap to strengthen their brand and plan marketing initiatives for the next year.
Brand Resilience Exposed
The time for reaction has passed. The pandemic is a fact of life now. Some things might return to the way they were someday. Others won’t. No one can know for sure — but brands can’t wait for certainty that may never come.

Instead of focusing on reaction, focus on resilience.

You can’t react to something you can’t see coming. Instead, build a brand that’s resilient. Resilience is the flexibility to respond to changing circumstances. It’s what allows brands not only to survive, but even to thrive in uncertain times.

Now is the time to build a brand that can carry your business through whatever tomorrow brings. And there’s a way to do that in a way that’s right-sized for your brand — budget shouldn’t dictate what you say, only how you say it.

“Resilience is the flexibility to respond to changing circumstances. It’s what allows brands not only to survive but also to thrive in uncertain times.”

—Anna Qvennerstedt
copywriter, global chair member
A resilient brand is your best defense against uncertainty.

A resilient brand is your best bet to create new opportunities.
For most brands, the COVID-19 pandemic hasn’t created problems so much as revealed them.

Business models have been upended, supply chains disrupted, and customer interactions changed indefinitely. Brands have had to adapt what they talk about and how they say it. The brands that have done the best under these difficult circumstances have been the ones built on the strongest foundations.

They’re the ones with the most deeply held values and the strongest understandings of the purpose they serve in their customers’ lives. Not just product attributes and features — which can change in priority during a crisis — but real human benefits.

As you sort through the myriad of guides and frameworks on navigating the amorphous “new normal” we hear so much about, it’s important to revisit your brand’s foundations. Does your brand have a real purpose or motive that guides it? Chances are, if you’ve felt stuck, unsure, or like you had nothing meaningful to say, there’s an opportunity to sharpen your brand’s point of view, putting it in the best position possible to weather the coming storms.
It starts with an understanding of your customer’s needs.

You’ve probably seen Maslow’s Hierarchy of Needs before. What brands must understand, and what COVID-19 has revealed, is that the needs at the bottom of the pyramid are also the ones that change the most. They change from hour to hour (when you’re hungry, for example) and over longer periods of time (when you lose your job, or suffer a health crisis).

Someone’s sense of identity — which doesn’t change as quickly — comes from higher up the pyramid.

That’s why resilient brands meet their customers’ needs at as many levels of this pyramid as possible. And, like all of us, they find stability at the top of the pyramid, not the bottom.
Resilient brands flip the pyramid.

Because a consumer’s functional, physiological needs can change so much so quickly, a brand built entirely on product attributes or benefits is built on shifting sands. Not great in an earthquake like COVID-19.

But if your brand has purpose at its foundation — a clear sense of not only what it does but why it exists — you gain both strength and flexibility.

**Purpose is the foundation of resilience.**
Brand purpose is the bedrock that allows you to **manage change**. It frees businesses rather than constraining them.

It's not that brand and product attributes aren't important. They absolutely are. But they can quickly become irrelevant in changing circumstances — not just a global pandemic, but also other things like changing tastes and technologies, or even the emergence of cheaper competitors. By engaging with consumers on a deeper level, you give your brand the freedom to pivot when you have to, while holding on to more of your customers.

<table>
<thead>
<tr>
<th>At risk</th>
<th>Resilient</th>
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<tbody>
<tr>
<td>A brand that focuses on delivering the best experience in movie theatres (comfortable seats, cup holders)</td>
<td>A brand that believes shared entertainment experiences bring us together, whether in a theatre or not</td>
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<tr>
<td>A brand that thinks the main thing it delivers is furniture at an affordable price</td>
<td>A brand that seeks to enable consumers to turn their home into a sanctuary on any budget</td>
</tr>
<tr>
<td>A brand that believes its only value is delivering food to your door quickly</td>
<td>A brand that understands how food can change your mood</td>
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And that brand purpose should be **unique and true to your brand**, lest you risk being indistinguishable when you do show up.

Recall the 65 brands that were featured in the widely viewed viral video showcasing uncannily similar commercials at the beginning of the lockdown.

Somber music in the background, “unprecedented times” mentioned, and a hollow “we’re here for you” promise underscored brands’ undifferentiated messages.
Half of senior brand marketers struggled to find a voice for their brands during COVID-19.

How resilient was your brand during the first two months of the pandemic?

Source: Forsman & Bodenfors survey, n=100, brand marketing decision makers in US & Canada

“Which best describes your brand’s response to the COVID-19 crisis?” fielded June 2020

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02

The Stats That Say It All
There are three sets of figures we’ll point to in this discussion:

1. Those that quantify how resilient brands benefited during the crisis
2. Those that show what brands lose by not finding their footing at this time
3. Those that show why resilience is a long-term need

Let’s start with the first.
Rapid shifts in behavior rewarded brands who were able to find their voices during lockdown.

Difficult times drove consumers to seek information and comfort through content, driving not only efficiencies in media costs, but also unlocking unique opportunities to engage audiences. Witness Gen Z, whose online video consumption jumped during the pandemic. Or Millennials, whose video consumption went up across the board, with linear, online, and connected TV.

Resilient brands that had something to share found attentive audiences ready to listen and react.

- Average reduction in media cost (CPMs) across major digital platforms yielded greater reach for the same dollar: 20%
- Directional increase in reach/GRPs across the connected and linear TV ecosystem: 24%
- Or more increase in time spent with media, an acceleration not expected to be seen until late 2022: 10%
- More time spent by adults on their smartphones each day throughout quarantine: 70%

Source: Internal MK data, MIQ North America
Source: eMarketer Time Spent With Media—Canada & USA
Nothing to say, a lot to lose.

Brands don’t get the privilege of turning off and on without any repercussions. Stagnancy leads to a decrease, not a plateau. So staying quiet comes at a cost. But just how much? Ipsos MMA has found the cost to address a decline in brand equity is typically $2x$ the savings of reducing the brand investment.

Kantar Millward Brown found that when brands maintained Total Brand Communication Awareness (TBCA) other brand measures like total brand awareness held up better. And TBCA can be achieved with less pricey media, which means there’s a you-sized response for your brand.

- $\approx 2\%$ revenue loss estimated for every quarter of pulled investment
- $11\%$ revenue declines possible for brands that completely cut advertising for the rest of 2020
- 3-5 yrs of solid and consistent brand-building efforts to recover from extended periods where media spend was completely cut

Sources: Nielsen; Ipsos; Kantar Millward Brown, July 2018
But is it too late now?
Has the time passed?

If history has taught us anything, it’s that there’s plenty of turbulence ahead, waiting to test the resilience of your brand.

The time to fortify is now.

13.3%  US unemployment rate, worse than the Great Recession

-6%  The economies of Canada and the US will shrink by about 6% in 2020

49%  of Canadians are teetering on the brink of insolvency, indicating they are $200 or less away from not being able to pay all their bills each month

20%  don’t expect normal purchasing habits to return until 6+ months from now, which could carry into the holiday season

Sources: Department of Labor Statistics (as of June 5, 2020), IMF, MNP Debt Index, CoreSight April 2020 Survey
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Shifts In The Cultural Current
The pandemic has resulted in eight cultural shifts that brands must be able to navigate.

- 01 Consumption
- 02 Leisure
- 03 Technology
- 04 Transparency
- 05 Authority
- 06 Community
- 07 Relationships with others
- 08 Relationship with self
People are caught in the tension between frugality and consumerism.

Consumers have become thriftier, learning to make groceries last longer and hacking solutions to household or personal care needs they otherwise would not have turned to. But alongside thriftiness we see boredom shopping and panic buying as those with the disposable income to do so look for new hobbies and pastimes to fill the void.

During a time punctuated by a looming financial crisis and an unclear path out of lockdown, the traditional material signifiers of status are shifting rapidly. Things like fast internet, a comfortable home-office setup, and the ability to secure now-crucial supplies like cleaning products and masks have become the most sought after.

As people look for comfort and security amid the uncertainty of the world, the brands that can pivot between utility and fulfilment will win.

Brand Example: Looking for innovative ways to keep consumers engaged while retail locations remain shuttered, Gucci unveiled a partnership with popular gaming app Tennis Clash.
We’re having to get creative with how to make our time meaningful.

Without the normal activities of daily life like commuting, eating out, recreational pursuits, and socializing with friends and family, people are facing confusion about how to fill their days.

The ease that once was leisure-time has been replaced by a pressure to be productive during this great reset, while also maintaining a semblance of what life once was like. With all of our social and recreational activities being scheduled online, people are relearning how to have fun and realizing it takes more effort to make these interactions meaningful.

Additionally, the issue of work-life balance will only be further magnified as people look for ways to combat the always-on trappings of working from home with other activities that bring them joy and purpose.
Tech will be more center stage than ever before, for better or worse.

With the home now transformed into the office, school, playground, gym, and social scene for people, the role of technology to facilitate a new sense of normalcy has taken center stage. Overnight, our days have become filled with one Zoom activity after the other.

Apps like Houseparty and TikTok, and updates like Facebook Rooms showcase Big Tech’s ability to reinsert itself into our lives and foster social connection in a time when we desperately need it.

However, the flip side of this is a new version of burnout in the form of “Zoom Fatigue,” which will only grow as an issue the longer social distancing and work-from-home mandates last.

We can expect brands that were previously low tech to pivot to using high-tech solutions in order to give consumers experiences reminiscent of the pre-COVID-19 world.

Brand Example: Airbnb made their popular experience platform virtual, allowing travelers to get the emotional benefits of gaining new perspectives and building relationships with strangers, without compromising their safety.
Transparency is a mandate.

Transparency in business practices has gone from a buzzword to a mandate, as consumers are increasingly anxious to know where their products are coming from and if brands are actually making a difference.

People are looking to the responses and actions of businesses during this time to assess whether they should boycott or “buycott,” placing even more pressure on brands to step up.

Now more than ever, there is an emphasis on the cohesion between brand communications and business realities as consumers pay closer attention and have a greater understanding of how these practices impact not only their own health but the safety of everyone involved.

Brand Example: Beyond supporting workers and vendors whose livelihoods were impacted by COVID-19, Microsoft committed to the Open COVID Pledge — making its patents available for free in an effort to curb the spread and impact of the disease.
The people are taking back authority and power.

During the height of the pandemic in North America, multiple missteps by corporations and governmental authorities alike made consumers question if anyone really had their best interest in mind.

Companies like Amazon were lambasted by the public for using their hold on their industries to manipulate the narrative, rather than supporting people in need. Meanwhile, government figures were accused of prioritizing their hidden agendas and protecting the economy over public health, seeding distrust and cynicism among their constituents. The ongoing presence of police brutality and systemic racism in America further exacerbated the distrust and unrest people are feeling toward traditional authority figures in the country.

As such, we can expect to see a shift back to the notion of “by the people, for the people.” Our distrust of the powers that be will affect who we choose to throw our loyalty and spending power behind. Self-serving corporations and government departments will see a fall from grace, while we redistribute authority and wholly reimagine the systems and services meant to keep us safe and protected.

Brand Example: eBay’s Up & Running campaign is built around an accelerator program that will help struggling sellers get back on their feet through a number of initiatives, including waived fees and access to a library of resources.
Community will triumph over individualism.

Prior to the COVID-19 pandemic, a great deal was being said about the digital world dividing us. Younger generations were described as self-involved and narcissistic, among many other things, as the drive to build a unique personal brand defined how they expressed themselves in the world.

And while the pandemic has revealed how deeply the notion of “every man for himself” runs in certain parts of North America, for the most part, we’ve realized we’re more alike than we thought, and that there’s power in common ground.

The recent widespread protests against police brutality and in support of the Black Lives Matter movement demonstrate our ability to band together for justice, even during a global pandemic. These events are not simply a trend, but rather point to a necessary and long-overdue shift to the status quo.

Brand Example: Diageo and its individual spirit brands created the Tips From Home platform to enable would-be bar patrons to unite together to support bartenders while bars are shut down.
Our interpersonal relationships are all being reevaluated.

When it comes to relationships with loved ones, some marriages have broken under the strain of cabin fever, while others have grown stronger. Similarly, previously neglected friendships have been given a fighting chance thanks to a wave of new social behaviors, such as Zoom house parties and online games.

Online dating apps have reported longer in-app conversations as users demonstrate a surprising willingness to forgo hook-up culture in favor of forming deeper connections to combat the loneliness of self-isolation.

All in all, we can expect brands that can adapt to the nuances of post-pandemic relationships and provide tools to overcome awkwardness to rise to the top in the months to come.

Brand Example: Tinder recently made its Passport feature free to all users in an effort to foster truer human connection in socially distant times.
Our relationships with ourselves will be stronger than ever.

Self-isolation has forced many consumers to confront long-buried truths about themselves. These uncomfortable moments of self-reflection manifested in an obsession with different forms of self-care and self-improvement. These were already trends prior to the pandemic, but quarantine presented an opportunity to actually translate thoughts into real behaviors. From baking bread and learning new languages to journaling and meditation, quarantine allowed people to focus on themselves and cultivate new hobbies.

This newfound confidence will change how we carry ourselves post-lockdown. People will begin to prioritize the aspects of their lives that bring them joy and fulfillment, over those that don’t, and we can expect to see a significant shift in the tone surrounding topics of conversation such as work-life balance and mental health — which are inextricably linked to self-image.

Brands that champion mindsets that enable personal growth and well-being will thrive in this world, while others whose commitment to wellness was purely superficial will likely struggle.

Brand Example: Billie’s “Are We Doing Video?” campaign encourages women to embrace their natural, unmade appearance on video calls, an important call to action as we transition into a world where both physical and mental well-being are more important than ever.
CASE STUDY

VOLVO: Protecting the people who protect us.

Volvo, a Forsman & Bodenfors client, has become synonymous with safety. Volvo cars are committed to protecting people — not just drivers and passengers — and marketing shared this vision with consumers. So when the pandemic hit, we saw a responsibility to help Volvo do what it can to protect people once again.

Given the nature of the crisis, it was important to protect healthcare workers. While others quarantined at home in safety, healthcare workers went straight into the eye of the storm, putting their own health at risk to heal and aid others.

Volvo provided thousands of test vehicles to those working in healthcare, so they could get to work safely. They could avoid public transport and move safely through cities during lockdown, making their jobs a bit safer and easier during this difficult time.

Cultural shifts addressed:

- Transparency
- Community
- Relationships with others
Where To Go From Here
With an understanding of the key cultural shifts that could shape tomorrow, it’s time to kick planning into full gear. How well is your brand positioned to deliver on each of them — and what will it take to avoid being left behind?

We’ve created a Resilience Scorecard to help you evaluate where your brand stands. Take a moment to give yourself a score on the eight cultural shifts. Which ones will be most critical to your brand’s future success?
Resilience Scorecard

Consumption
Do you have multiple ways to take your product to market?
Do you have the ability to scale it across different consumer cohorts?
Is your product or service flexible to a shared or subscription model?

Authority
Do consumers care about your point of view?
Is there someone in your organization people trust?
Can you reliably and authentically provide authority in your category or beyond?

Leisure
Do you empower people to be creative or inventive with your offering?
Can you find new ways to be used in our new ways of living?
Do you help your users create identity? Who do they become using you?

Community
Have you identified a specific community you cater to?
Do you empower or engage with your community?
Do you think about how you operate in different cultural or geographical realms?

Technology
Are you taking advantage of available technology?
Are you available on- and offline?
How are you providing useful content?

Relationships with Others
Do you create relationships or build bridges with strangers?
Do you encourage and empower loved ones to be together?
Do you have technical solutions to share/review/co-build your brand experience?

Transparency
Are your manufacturing practices public?
Do consumers have access to senior executives?
Is how you make and distribute wealth clear to consumers?

Relationship with Self
Do you facilitate personal growth for your users?
Do you have a defined version of wellness for your brand?
Do you support your users for who they are?
## Resilience Scorecard

<table>
<thead>
<tr>
<th>Score Range</th>
<th>Description</th>
<th>Recommendation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-39</td>
<td>Back to Square 1: Your brand will likely struggle to recover from the crisis</td>
<td>A full brand strategy pivot. Chances are you’ll have to shift some of the fundamental pieces of your brand or reassess how well you know your audience.</td>
</tr>
<tr>
<td>40-54</td>
<td>Potential to Adapt: Your brand has some of the right building blocks in place but will need to patch up some holes in the aftermath of the storm.</td>
<td>Start with an audit of the state of your business and what you have to work with moving forward. How are your brand purpose and products still relevant?</td>
</tr>
<tr>
<td>55-69</td>
<td>On the Right Track: You’re in a good place; although the crisis presented some challenges, you took them in stride and are likely already regrouping on your next move.</td>
<td>Zero in on your weak spot(s). Perhaps you fell short in one territory; let’s work through how you can fortify that aspect of your brand so you can tackle what comes next.</td>
</tr>
<tr>
<td>70-80</td>
<td>Future-Proof: Good job; your brand should have no problem thriving in our new reality. The building blocks in place will continue to serve your brand well.</td>
<td>Start planning campaigns. What brand moves can you make to maintain your head start? What does brand care look like in the context of new behaviors?</td>
</tr>
</tbody>
</table>

**How did you score? ** ___ / 80

- **1-39**: Your brand will likely struggle to recover from the crisis and find its footing in our new world. A serious evaluation is required.

- **40-54**: Your brand has some of the right building blocks in place but will need to patch up some holes in the aftermath of the storm.

- **55-69**: You're in a good place; although the crisis presented some challenges, you took them in stride and are likely already regrouping on your next move.

- **70-80**: Good job; your brand should have no problem thriving in our new reality. The building blocks in place will continue to serve your brand well.
One final note. Of the 11 principles we live by, we think this one is particularly helpful to keep in mind right now.

1. We always aim for world class.
2. The responsibility is yours.
3. The collective is our Creative Director.
5. The only boss is the task itself.
6. Strategy and creative is one process.
7. We work closely with clients.
8. When it comes to recruiting, we want the right people, not just the right qualifications.
9. We embrace a “no frills” approach.
10. Forsman & Bodenfors is a human workplace.
11. **We can make the world better. (Or worse.)**

“We have the power to change things. Opinions, ideals, attitudes and what people choose to do. And we want to have a positive impact, not only on our clients’ businesses, but also on society. We try to find and communicate our clients’ best selves. Which often means trying to get them to do interesting things that really help people, or the planet.”
Forsman & Bodenfors is a global creative collective working to unlock the power of creativity through collaboration in order to build the most human and iconic brands and businesses in the world. Forsman & Bodenfors’ client roster includes Volvo, P&G, Google, Diageo, Hyatt, LG, LVMH, Adidas, General Mills, YouTube, Jaeger-LeCoultre, Church & Dwight, iRobot, and H&M, among others. In 2018, Fast Company named the agency one of the most innovative companies in the world while Ad Age named it one of its agencies to watch in 2019. Forsman & Bodenfors has more than 600 team members across seven offices in Gothenburg, New York, Stockholm, Toronto, Montreal, Shanghai, and Singapore.

To learn more about Forsman & Bodenfors, please visit forsman.co.
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