



DON'T PAUSE PRESS PLAY

**HOW BRANDS CAN ENTERTAIN
A WORLD ON LOCKDOWN**



APRIL 2020



***WE'RE LIVING THROUGH A
FUNDAMENTAL SHIFT IN
WHAT THE WORLD WANTS
FROM ENTERTAINMENT***





WHEN LIFE IS ON PAUSE, PEOPLE WANT TO PLAY

We're coping with the effects of lockdown and social isolation by streaming, gaming, videoconferencing and documenting the weirdness of our new lives on social media at unprecedented levels.

Zoom's daily active users jumped from 10 million to **over 200 million** in 3 months

Source: Reuters

95% of people are spending more time on at-home media consumption

Source: GWI Global Survey

Total messaging activity across Facebook, Instagram and WhatsApp is up by **50%**.

Source: Facebook

6.2 million people in the us alone downloaded TikTok in March 2020

Source: Music Business

Both Netflix and YouTube are now **streaming in SD only** across the EU to save network capacity

Source: Netflix & Google



BECAUSE ENTERTAINMENT MATTERS IN TOUGH TIMES



In a time of crisis, entertainment fulfils a number of crucially important practical and emotional roles in people's lives

COMMUNITY

Offering us experiences to share with others

DISTRACTION

Taking our minds off immediate concerns

CONNECTION

Facilitating conversations and social occasions

INFORMING

Delivering useful information, help or advice

INSPIRATION

Giving us something to aspire to

FULFILMENT

Helping us feel like we've done something



ENTERTAINMENT HAS RARELY BEEN MORE NEEDED, OR MORE AT RISK



COVID19 IS A PAN-GLOBAL, ALL-CHANNELS, 24 HOUR EVENT

The world's media consumption is higher and more united than at any point in the last two decades



DURING A CRISIS WE NEED ENTERTAINMENT

Consumption is soaring across all channels as people on lockdown seek something to do with their time



BUT THIS CRISIS PUTS THE VERY BUSINESS OF ENTERTAINMENT AT RISK

Cancelled sponsorships, advertising and influencer spends make it increasingly difficult for creators to make the entertainment people need



WHAT ENTERTAINMENT FEELS LIKE IS CHANGING

As TV production slows and changes during lockdown, influencer content will become more important – and traditional media output looks more like influencer content as well.



SO BRANDS HAVE A CRUCIAL ROLE TO PLAY

Brands have a clear opportunity to build and sustain consumer relationships by stepping in to keep entertainment going



***SO HOW IS
ENTERTAINMENT
CHANGING IN THE
TIME OF COVID-19?***





A RENAISSANCE FOR MASS ENTERTAINMENT

In a time of isolation we're turning away from personalization to get the sense of community that comes from watching the same thing at the same time

THE RENAISSANCE OF LINEAR TV

TV usage is up **22%** in the US (Nielsen). In the UK daily daytime TV viewership is now at level not seen since Christmas 2013.

LIGHT ENTERTAINMENT WINS THE DAY

As continuing dramas across the world close down production, light entertainment is stepping into the breach for people seek refuge from the news. In the UK 13 million people watching Saturday Night Takeaway on ITV. In Australia, light entertainment program Gogglebox has seen a surge in its ratings since the beginning of the crisis.

GAMING COMES INTO ITS OWN MASS VIEWING EVENT

F1 turned the cancelled Bahrain Grand Prix into an eSports event at very short notice, securing over **100k** concurrent views.

EVERYONE IS GOING LIVE

Use of Instagram's Live feature has exploded as celebrities and influencers turn their feeds into live video broadcasts to entertain and inform fans who are stuck at home. These range from Drake's Quarantine Radio, which attracted a record breaking **300,000** viewers, to Miley Cyrus' homemade chat show Like Minded, which leverages the pop stars' contacts to discuss serious issues like mental health.



A TIME FOR ESCAPIST ENTERTAINMENT

At times of stress, entertainment plays an important role in transporting us to happier and more pleasurable places than the here and now.

DIGITAL CLUBBING

The extended lockdown in China led to people letting off steam in cloud raves. These often paywalled digital club events take place on Douyin (China's equivalent of Tik Tok) and give partygoers access to exclusive DJ sets and a party atmosphere they could access from home.

LOSING OURSELVES IN FICTIONAL WORLDS

In the UK, sales of novels are up 30% and non-fiction is down as people seek an escape from reality in the form of stories with a beginning, a middle and a happy ending. In the US, online retailers are reporting a surge in demand for print books. Bookshop.org reported a 400% increase in sales.

TAKING OUR PLEASURES WHERE WE CAN FIND THEM

As people spend more time alone and indoors, use of online pornography is spiking. Pornhub has reported a 20% jump in yoy traffic and as a goodwill gesture has made premium access free to viewers in countries on lockdown.

NEW FORMATS FOR SHORT ATTENTION SPANS

The early success of new short format streaming platform Quibi shows a clear appetite among viewers for snappy entertainment formats that blend the best elements of TV and meme culture.



ENTERTAINMENT IS THE SOCIAL EVENT NOW

People aren't just switching on to switch off. Entertainment is now the way we sustain our relationships virtually, using TV, films and gaming to connect with the people who matter in our lives.

HOUSE PARTY

This social video app is the **number 1** in 17 countries as people seek an informal way of connecting with others while disconnecting from work through chat and simple social games and quizzes

NETFLIX CONNECT

Netflix has launched a feature that replicates the experience of watching TV with friends and family in the age of social distancing

DISCORD

Discord, a voice app that gamers use to talk to each other while playing games, has reported a **200%** uplift in new sign-ups. Meanwhile Switch consoles are sold out while Xbox's servers struggle to keep up with demand



WE'RE GOING OUT WHILE STAYING IN

People are devising creative workarounds so that they can lead active social lives without leaving the house. They're using technology to replicate the experiences and social contact they would otherwise be missing out on.

DRESSING UP FOR THE THEATRE AND THE OPERA

Theatres and orchestras are streaming performances to keep people connected to culture during lockdown. The people viewing them are treating them as a special occasion by changing out of their sweatpants and into their best clothes

VIRTUAL PUBS, CLUBS, DINNER PARTIES

People are filling up their virtual diaries via video conferencing platforms to host book clubs, dinner parties and even have cocktails with strangers during **virtual happy hours**. Brands like Bacardi are stepping in to facilitate these moments and support businesses with a #raiseyourspirits virtual bar.

CONSOLE BASED CATCH-UPS

Gaming offers people the opportunity to drop in on friends and family for catch-ups

For example, Animal Crossing, a hit game for Nintendo Switch, offers players the opportunity to visit another player's island & roam around their new island home

DARK SOCIAL QUIZ NIGHTS

Family and friends' group chats which used to buzz with news items are buzzing more than ever – with memes, riddles brainteasers and improvised trivia quizzes. Pubs and bars are also getting in on the action, keeping in contact with their regulars during lockdown by hosting **virtual pub quizzes**



WE VALUE ENTERTAINMENT WITH A MESSAGE

People need help and advice in finding a new normal for themselves and their families. At a time of stress, this advice also works better if it feels clear, digestible and fun. Clever broadcasters, entertainment brands and brands themselves are fulfilling this need for entertainment with messages about hygiene, safety and mental health using strategies like catchy songs, familiar characters and gamification.

SESAME STREET

The iconic children's show has responded to school closures by expanding its range of resources for parents and children. This includes advice on creating routines, self-care and strategies for talking to children about COVID-19

THE DETTOL HANDWASHING CHALLENGE

Dettol joined TikTok to promote better public health in India through entertainment. It created a memorable song for good handwashing technique, launched it with influencers on the platform and challenged consumers to make their own versions. The resulting content generated **8.7 billion** video views

DR WHO

The current doctor Jodie Whittaker stepped back into the character from her own quarantine to **deliver a message of hope** and some advocacy for a science in a form familiar to fans of the show.



WE EXPECT INFLUENCERS TO BECOME EDUCATORS AND ENTERTAINERS

In a world where they're often media organisations in their own right, influencers are playing an important public service role. They're using their platforms to disseminate important information, impart life skills and give us some sparks of joy in anxious times.

JOE WICKS

Health and fitness influencer Joe Wicks is stepping in to help frazzled parents homeschool their children with daily PE lessons and raise funds for the NHS.

A BEAUTIFUL MESS

As people are probably going to be home-bound for the next few weeks, lifestyle influencers Elsie and Emma are creating content that shows their followers how to entertain themselves with home decor projects, crafts and recipes.

RACHAEL RAY

In the US, TV host and celebrity cook Rachael Ray shared with her followers a comprehensive collection of 15 meals made only with "pantry staples" — which include a heaping helping of frozen items and canned goods.



BUT WE ALSO NEED TO SWITCH OFF

The platforms and media we need to keep us connected also make us anxious. Millions are therefore consciously taking time away from technology to do something real by themselves and with their families.

CRAFTING

Crafting and knitting sites in the UK and beyond have been inundated with orders as people view the downtime as a chance to take up – or remember – a craft like knitting, embroidery and make something, or find activities to keep the kids occupied.

BAKING

Supermarket shelves have been cleared of items like flour and yeast and social media flooded with pictures of the bread, cakes and other baked goods people have made to alleviate their anxiety.

HOME AND SELF-IMPROVEMENT

Online searches for home office and gym equipment have spiked and online retailers are struggling to keep up with demand as people make their homes into spaces where they can work and stay active.



AND WE HAVE KIDS TO ENTERTAIN

Decades of parental concerns about screen time and over-exposure to the Internet are going by the wayside as parents seek ways to school their children from home and keep them entertained so they can get some work done themselves.

FREE BEDTIME STORIES

Audiobook platform Audible has lifted the paywall around hundreds of titles in its children's book selection to keep kids entertained - and improve access to books financially constrained households

VIRTUAL SCOUTING

Bear Grylls and the Scouts movement have teamed up to help parents do find things for their children to do during lockdown. Together they created and shared 100 free activities, games and craft ideas on their website which promise to entertain while improving a child's communication or problem-solving skills.

EDUCATIONAL AND FAMILY PLAY

Sales of traditional board games and jigsaw puzzles have soared by 240% as people seek ways to keep the whole family occupied across generations. Toys that blend entertainment and education such as Lego have also benefited significantly, with John Lewis reporting threefold sales increases in March 2020.

SO WHAT DOES THIS MEAN FOR BRANDS?

It is vital that brands identify a role for themselves which is valuable to the wider community, and providing entertainment can be that opportunity, for the right brands.



PRINCIPLES FOR ACTION



How to establish a brand as a trusted partner in the present situation – and where might provision of entertainment be an option

1

SHOW UP AND DO YOUR PART

Brands have a vital role to play. Now is not the time to disappear, but to show up and use all your resources and creativity to make a difference.

People will need emotional support as well as physical. Particularly during the most restrictive phases of lockdown. Entertainment could be a valuable way to provide that

2

DON'T ACT ALONE

There is strength in collaboration. To truly help people during this crisis requires a joining of forces with others, most critically government.

Few brands are expert in creating entertaining content in their own right, but partnership with influencers and entertainment businesses can be fruitful.

3

SOLVE, DON'T SELL

Brands should focus all efforts on finding appropriate and meaningful solutions to the problems people are facing today.

Don't try to bring product messages into the content you produce. It must be for the benefit of the viewer, not the brand sponsor. Demonstrating generosity will build trust.

4

COMMUNICATE WITH EMOTION, COMPASSION AND FACTS

People are reassured by positive brand actions and commitments. Communicate with empathy to help both inform and calm. There are many occasions where the reach brands have can be a powerful supplement to official messaging, and for many brands, their ability to connect with audiences through entertainment can enhance that.

AN AGILE APPROACH TO IDENTIFYING THE ROLE BRANDS CAN TAKE IS ESSENTIAL IN A CRISIS.



**A LEARNING
CYCLE THAT
ALLOWS US TO
ADAPT AND
IMPROVE OUR
COMMS IMPACT**

Drawing on Edelman's global experience and learnings from China and other countries already recovering through the pandemic, we will constantly review and predict best practise for brands and businesses, based on the latest available data

1.

DEFINE A VALUABLE ROLE

Understanding the right way, at the right time and the right place to act how to express it

What is an appropriate, valuable place for the brand/business to be active? How can it best play a role and communicate that role. It might be throughout the phases of the crisis or only in one. It could be to act, to inform or to entertain.

3.

ADAPTING AND EVOLVING

As the situation evolves, learning from the global network how to best contribute

2.

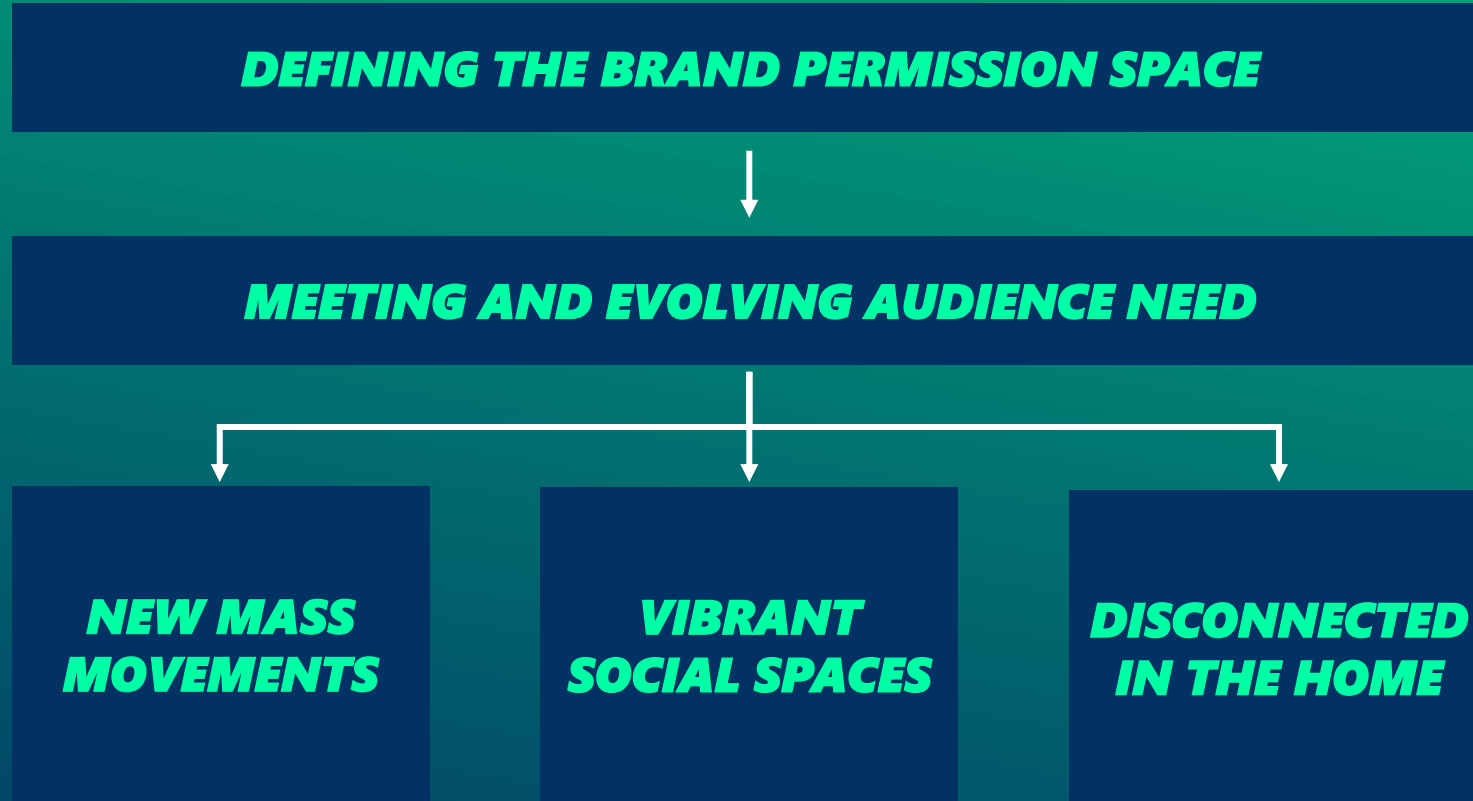
ACTIVATE DISTINCTIVELY

Ensuring relevance and appropriateness for internal and external stakeholders

Activating a programme of activity and communication which adds value and builds trust amongst internal and external stakeholders. Using the range of interventions available

COVID-19

STEP 1: DEFINING A VALUABLE ROLE



STEP 1: DEFINING A VALUABLE ROLE IDENTIFY YOUR BRAND'S PERMISSION SPACE

WHAT KIND OF ENTERTAINMENT WILL PEOPLE EXPECT AND ACCEPT FROM YOUR BRAND?

- What's your occasion?
- Where do people encounter you?
- What's your heritage in sponsorships and partnerships?

HAS THIS CHANGED SINCE THE CRISIS?

- How has the occasion you are associated with changed?
- Have sponsors or partnership agreements been cancelled, are the places where your brand shows up closed?

STAY TRUE TO YOUR BRAND VALUES BUT ADAPT

- The role you play should be rooted in what your brand currently stands for, but adapted to the time.
- Focus on audiences for whom your relationship is already bigger than the product you make.



STEP 1: DEFINING A VALUABLE ROLE

MEETING AN EVOLVING AUDIENCE NEED

NEW MASS MOMENTS

What are the new mass entertainment moments that your audiences might be interested in?

How can you support, amplify or enhance them?

How can you help your audiences discover them and experience them better?

VIBRANT SOCIAL SPACES

As people seek ways to create social interaction from locked down lives, what can your brand do to help?

Who is being excluded from these? Which groups have additional needs you can support?

How can you enhance or amplify the experience in a way which is not intrusive?

DISCONNECTED IN THE HOME

With the explosion of craft, brands can help people get out from behind screens for entertainment.

How can you enable and encourage a new culture of making?

How can you create rewards for creations in the digital space to inspire others?



STEP 2: ACTIVATING DISTINCTIVELY

Activating a programme of activity which adds value to the entertainment landscape and enhances the lives of audiences

VALUABLE AND DISTINCTIVE
ENTERTAINMENT

1

Have a clear outcome in mind

2

Build agile and responsive content approach to remain relevant

3

Identify partnerships to enhance content and add value to audiences

4

Avoid commercial messages, beyond brand badging

5

Be true to your brand voice, but be empathetic and appropriate for the mood and context



STEP 2: ACTIVATING DISTINCTIVELY

Forge partnerships that help distribute entertainment effectively

SUPPORTING INFLUENCER EFFORTS

- Can you support, collaborate with and enhance existing influencer initiatives so they have more impact and reach?

RESPOND TO DIGITAL TRENDS

- The digital landscape is shifting rapidly.
- Be agile and open to exploring fast growing platforms like TikTok, Zoom etc

USE YOUR MEDIA BUYS AS LEVERAGE

- Use your media buys and budget to the best effect. You can retool this spend to find larger audiences for the entertainment you're supporting



STEP 3: ADAPTING AND EVOLVING

1

THE BROADER LANDSCAPE – WHAT IS DRIVING

- Content availability
- Social impact
- Economic fallout & implications

2

CHANGING CONSUMER ATTITUDES AND NEEDS

- The new focus on safety and security
- Increased consumption and expectations
- Importance of Community building and social connectedness
- More in home needs

3

YOUR IMPACT

How relevant, visible, and engaging is your effort to your community, stakeholders, society.



EVALUATING SUCCESS - USING ETM SYSTEM



BRANDS IN THIS SITUATION WILL BE JUDGED AS SUCCESSFUL FOR THE DIFFERENCE THEY MAKE, AND THE DIFFERENCE THEY ARE SEEN TO MAKE

Successful communication will amplify the actions brands are taking and defining that role in the minds of the public

It will depend on demonstrating the four drivers of trust in behaviour and communications

ABILITY

INTEGRITY

DEPENDABILITY

PURPOSE

EDELMAN TRUST MANAGEMENT OFFERS A WAY OF DYNAMICALLY ASSESSING PERFORMANCE AGAINST THESE DRIVERS OF TRUST

APPENDIX

