

OMG Omnicom MediaGroup

COVID-19 - ITALY

MARCH 19th 2020

CONTENTS

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3. CONSUMERS POINT OF VIEW
4. BRAND REACTIONS

1. SITUATION UPDATE

Italy - key events and timeline

JANUARY / FEBRUARY 2020

- **JAN 29th** – first two Italian cases (Chinese tourists) in Rome
- **FEB 6th** – another case (Italian person coming from Wuhan) in Rome
- **FEB 21st** – first cases in two different Italian regions (Lombardia e Veneto)
- **FEB W/O 24th** – more cases discovered in many Italian regions. Italy is divided in red areas (maximum alert) and yellow areas (medium alert) and precautionary measures depend on areas, regions and municipalities. In many regions schools, gyms, clubs, theatres, museum and cinema are closed, aggregational events are canceled and public places are implementing new rules (reduced opening hours, distance from people, etc.)

MARCH 2020

- **MAR W/O 2nd** – the alert continues and all events across Italy are suspended until April 3rd. Schools remain closed in all Italy until mid March. Big events (fairs, exhibitions) are postponed in June/July and many flights from/to Italy are canceled until May.
- **MAR 8TH** – all the Lombardia region and other 14 districts are warning zone until April 3rd. Schools remain closed as well as cinema, theatres, gym and in general all the public places where people can gather. Also bars and restaurants will be closed after 6 PM. People work more and more from home and the advice is not to go out and travel out of the cities is allowed only for urgent matters. Supermarket are open.
- **MAR 10TH** – the measures for containing Covid-19 have been extended to all Italy. Supermarket, drugstores and public transportation are guaranteed. Shops, bars and restaurants remain closed until March 25th.
- **MAR 15TH** - containment measures have been taken in other European countries and worldwide

The first data highlight a decline in tech sector both in physical and in on-line store

-8,9%

in traditional point of sales

-6,1%

on-line sales

-8,4%

in terms of tech sales in the week of February 17th
compared to the prior four weeks

-10%

in Lombardia

-12,4%

In north-east Italy

-31,4%

dryer

-27,4%

air conditioning system

-27%

printer

-24,1%

vacuum cleaner

-17,4%

coffee machine

-6,7%

smartphone

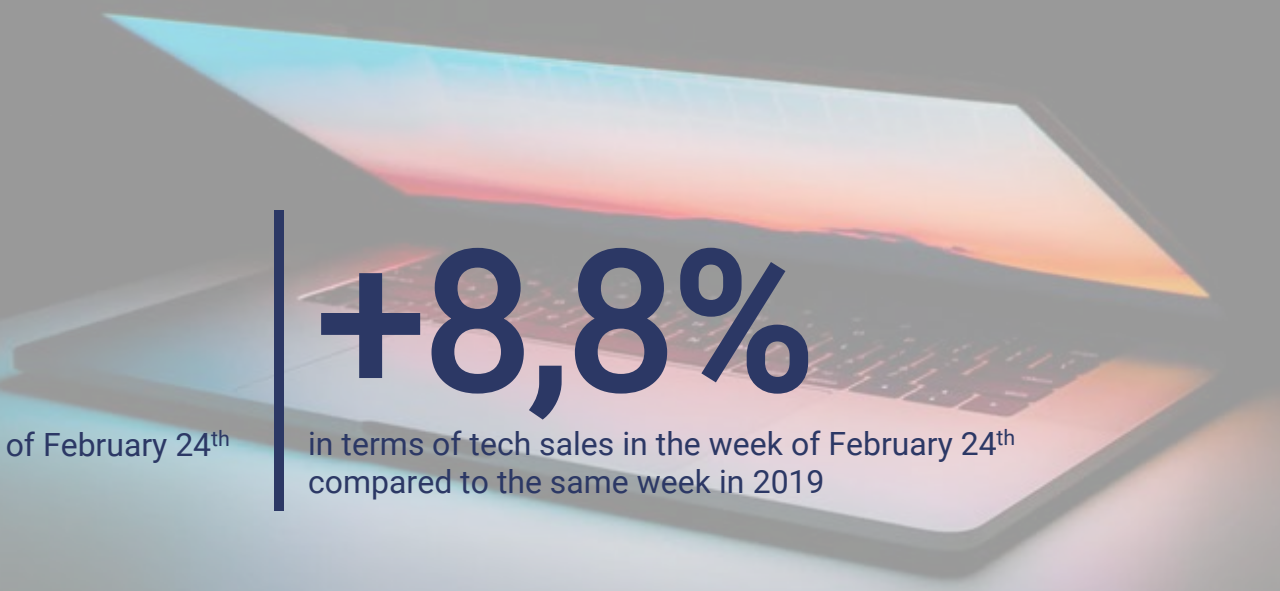
Tech industry has registered a strong decrease in terms of sale both in physical and in on-line stores.

The most affected area is North Italy, especially Lombardia region.

Big domestic appliances are strongly decreased as well as small ones.

Smartphones, which are the appliances with the biggest revue, have lost almost 7 percentage points.

Even if the following week is already filling the gap



-1,9%

in terms of tech sales in the week of February 24th
compared to the prior four weeks

+8,8%

in terms of tech sales in the week of February 24th
compared to the same week in 2019

On the other hand, mass market retailers have experienced a boost

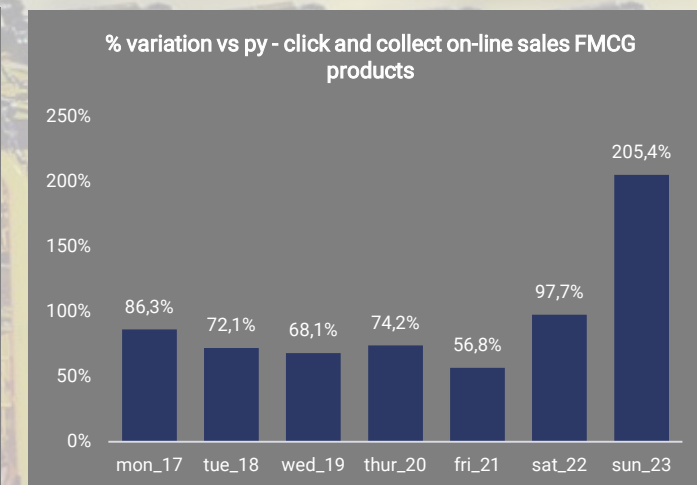
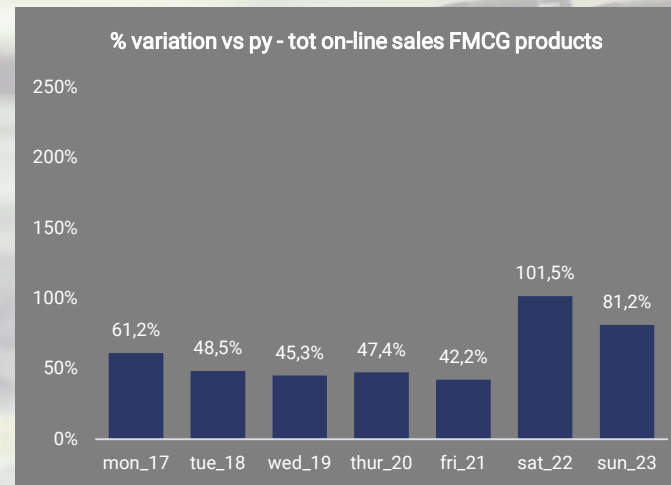
+8,3%

in terms of value sales in MMR in **physical stores** in the week of February 17th compared to the same week in 2019

the **peak** was registered on **Sunday 23rd** with **+73%** of value sales in northern Italy, especially in Lombardia (+87%) and Veneto (+41,6%)

+56,8%

in terms of value sales in MMR in **on-line stores** in the week of February 17th compared to the same week in 2019



Two main evidences arise:

- the **"week-end panic"** due to the massive news about the increase of the number of positive cases of the virus
- the **positive trend of "click&collect"** services instead of the more classic door to door delivery

Essential goods and para-pharmaceutical products in the shopping cart in the first week of the emergency

RICE



+33%

CANNED
FOOD



+29%

PASTA



+25%

TOMATO
DERIVATIVES



+22%

SAUCES



+19%

PERSONAL
CARE



+112%

in terms of value sales in the week of
February 17th compared to the same
week in 2019

Also in the second week of the emergency basic food and sanitizing products have been stocked up by Italians

BASIC FOOD

FLOUR



+82%

RICE



+61%

PASTA



+57%

BOTTLED
WATER



+19%

BREADED
FISH



+34%

FROZEN
VEGETABLES



+22%

PERSONAL CARE

WET WIPES



+260,3%

SOAP



+83,5%

PAPER TOWELS



+31,7%

HOME CARE

ALCOHOL



+347,0%

BLEACH



+87,8%

And the growth for mass market and e-commerce continues also during the lockdown

SALES VALUE GROWTH VS 2019

	17-23 Feb	24 Feb - 1 Mar	2 Mar – 8 Mar
TOTAL MM	+8,3%	+12,2%	+11%
Area 1	+11,2%	+9,9%	+7,9%
Area 2	+9,7%	+12,8%	+7,5%
Area 3	+4,4%	+12,8%	+12,9%
Area 4	+6,1%	+15,8%	+20,9%
the concern has spread throughout Italy			
E-COMMERCE	+56,8%	+81,0%	+82,3%

People's behaviors are also rapidly changing

49%



avoid public and crowded places

30%



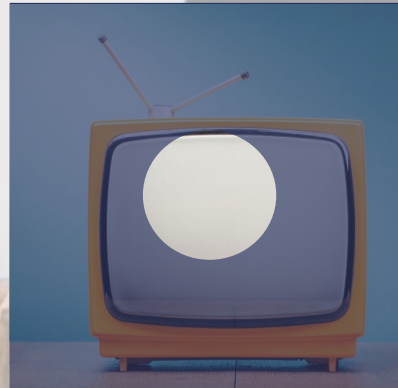
avoid to take public transportation

8%



is working from home

1 out of 3
have reduced eating
and drinking outside



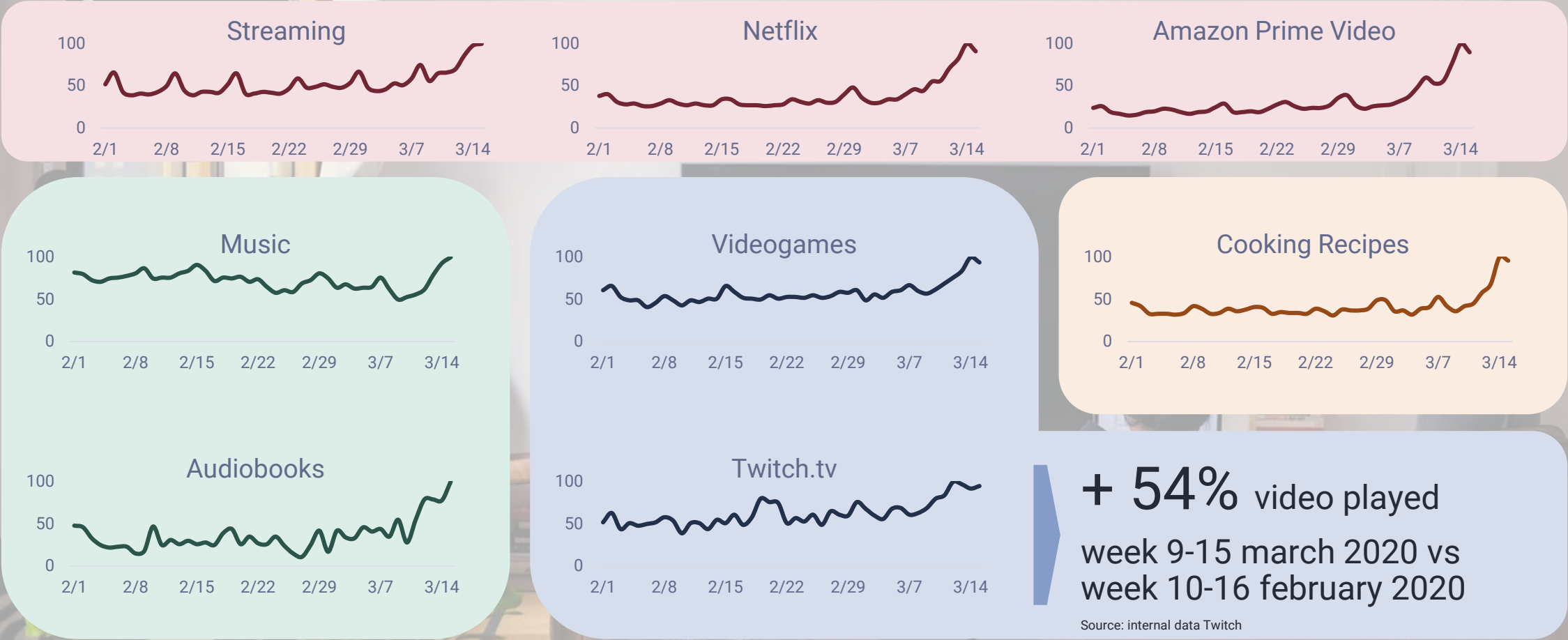
27%
have
declared to
watch more
TV



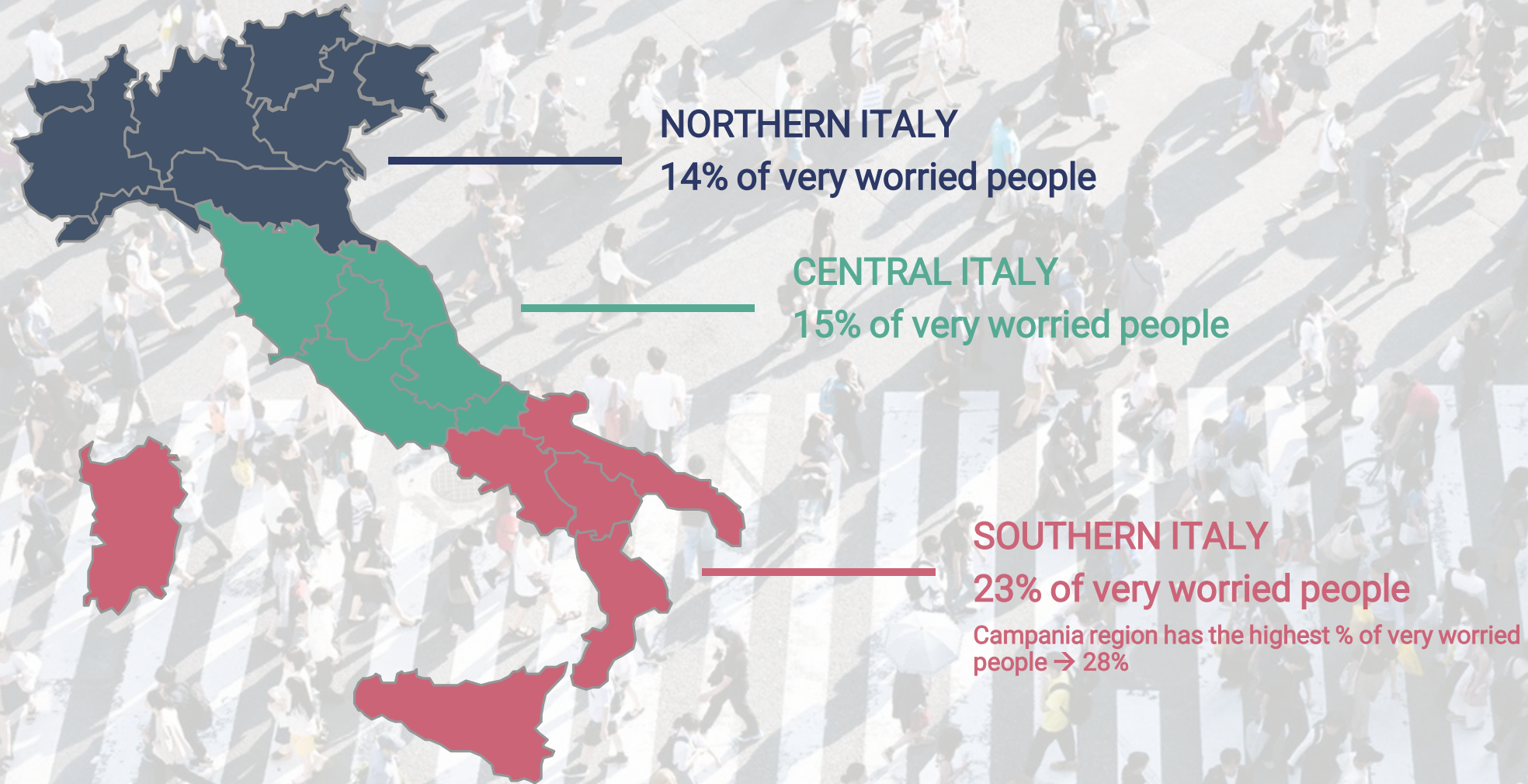
15%
have
declared to
watch more
on-line
video

And new forms of home entertainment are on the rise

Trend Google searches by topic
(100=day with more searches)

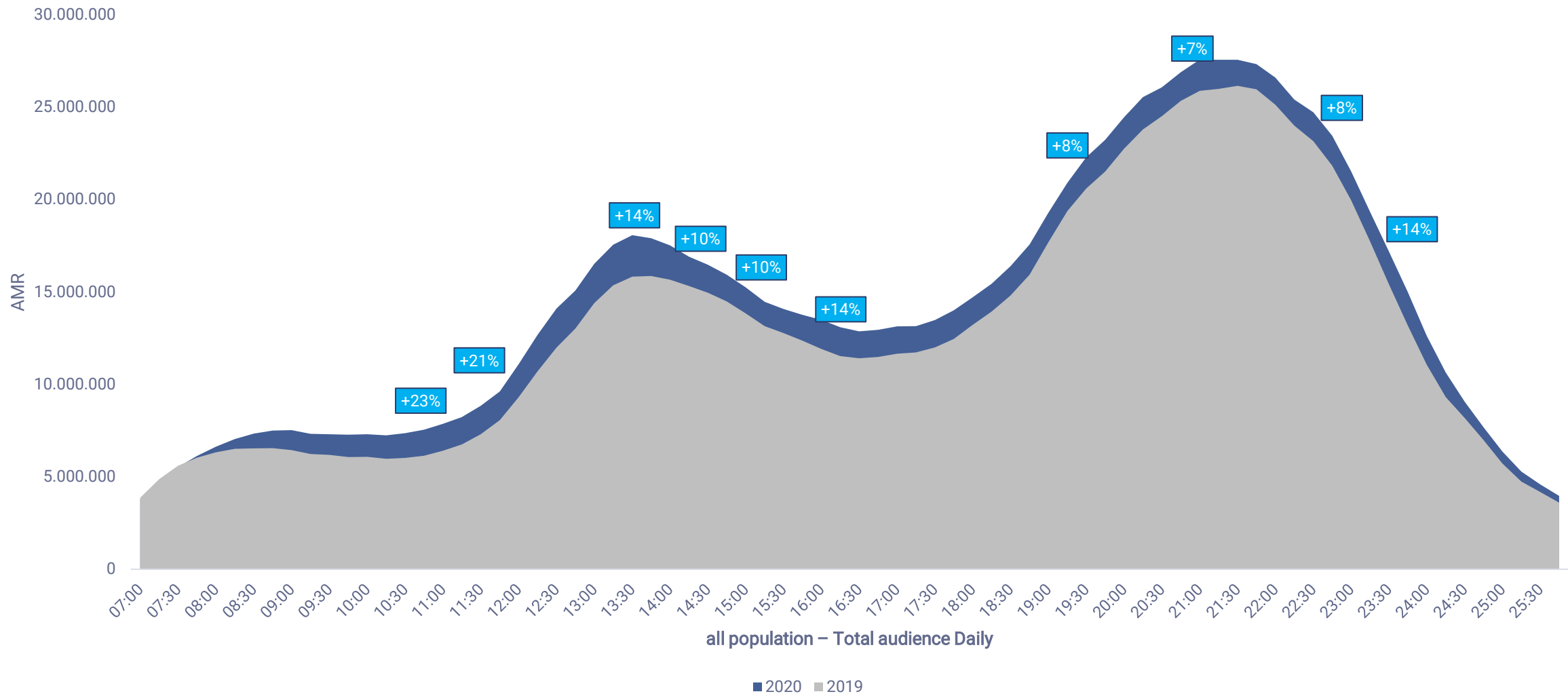


The most worried are the less involved in the epidemic

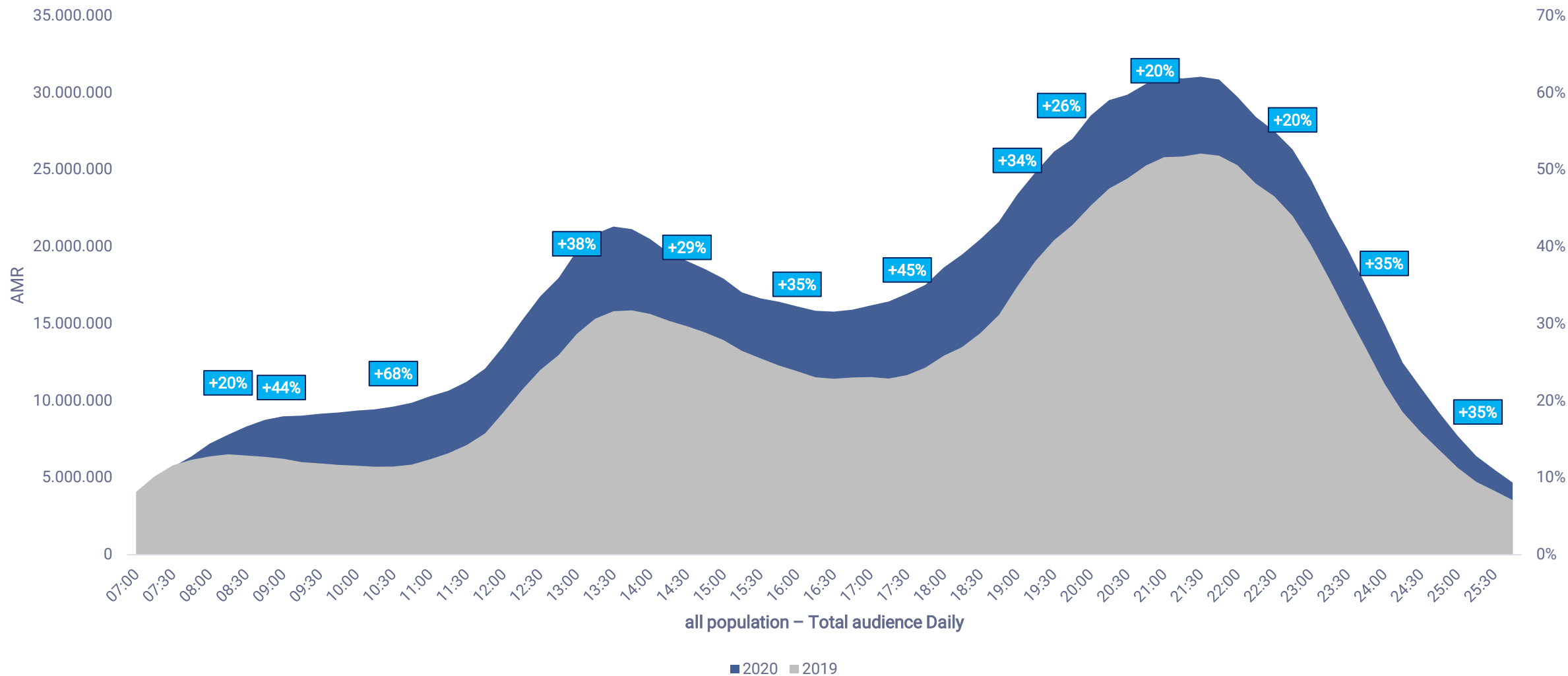


2. MEDIA DYNAMICS

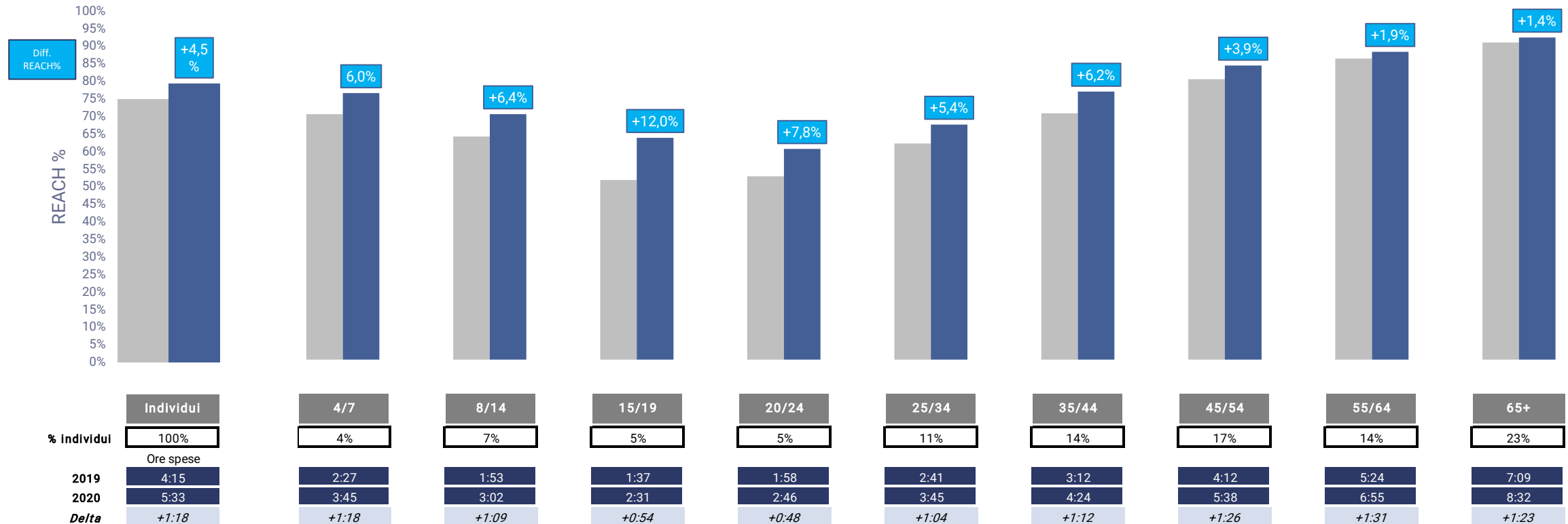
Tv consumption reveal an increase during daytime and late evening. +20% in terms of average minute rating between 10 and 12



Total tv audience grows more in the next week in all time bands with a peak in the morning (+54% between 9am and 1pm)



Reach has +4,5pp: daily spent time grows for all the targets (+78 min vs 2019) with 5h and 30min spent on average



Talking about radio, classic broadcasting station push on digital radio

DEE JAY
APP LIKE A DEEJAY

Pump App the volume | **Scarica la nuova App di Radio DeeJay**

RESTA SEMPRE AGGIORNATO | NEWSLETTER | ABBONATI | LEGGI IL QUOTIDIANO | ACCEDI

LIVE

Coronavirus, "l'Italia chiamò": volti e voci dell'Italia che resiste, il grande live streaming del MiBact

ESPANDI E ASCOLTA

la Repubblica
13 Marzo 2020 - Aggiornato alle 08.09

Jeep

Available on the App Store
GET IT ON Google Play

STORIE DEL SUPERCALCOLO | Leggi l'articolo

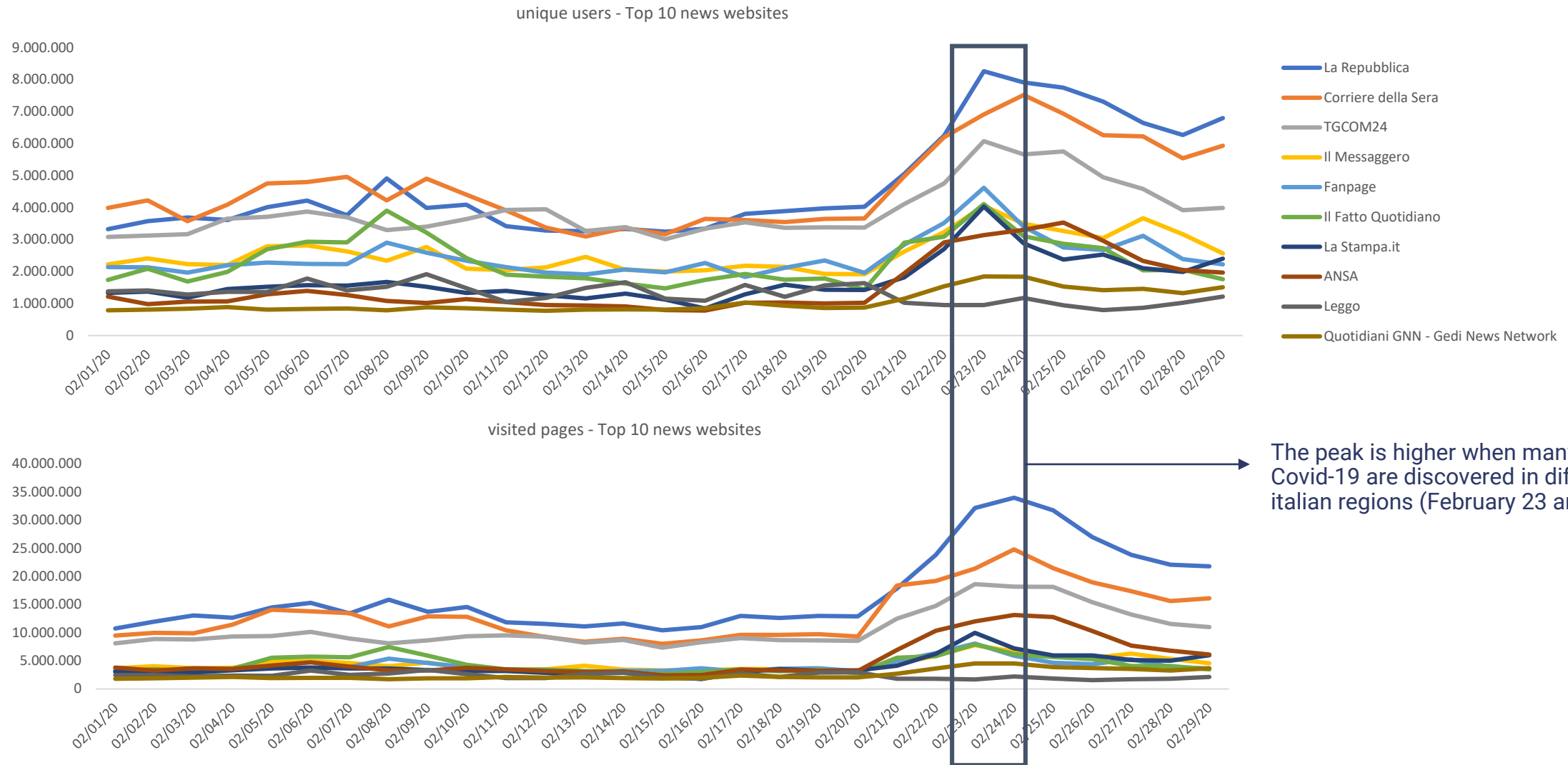
La prima cosa bella di GABRIELE ROMAGNOLI
La prima cosa bella di venerdì 13 marzo è una parola che può...

Stazione futuro
Terapia anti panico 15: il metodo John Belushi

Jeep

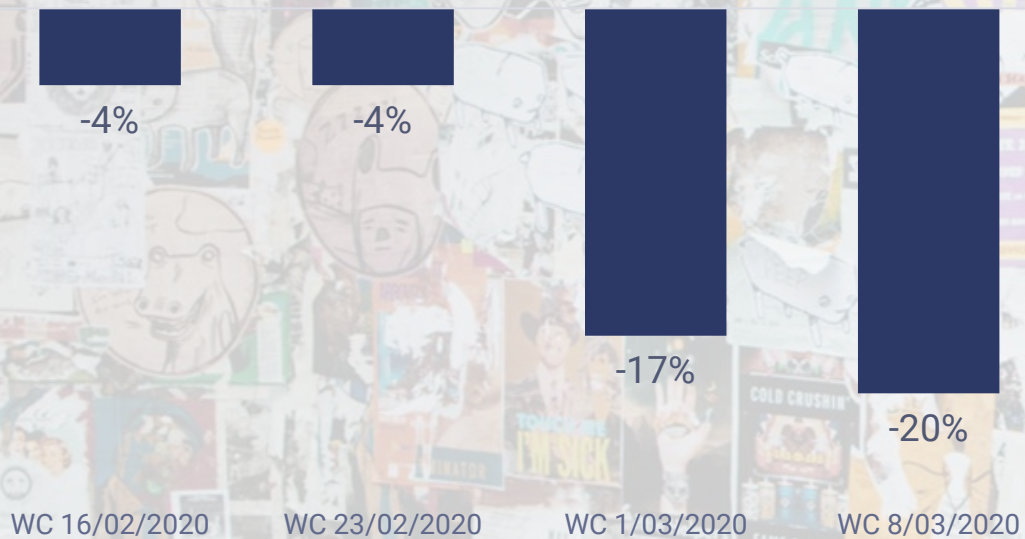
Available on the App Store
GET IT ON Google Play

WHO talks about *infodemia* to identify the abundance of information in a crisis situation. News websites have experienced it on February 24th



The adv market grows in the first 2020 bimester. The crisis shows its effect in the first week of march

MEDIA INVESTMENTS



1-14 MARCH TREND PER MEDIA



1-14 MARCH TREND PER SECTOR



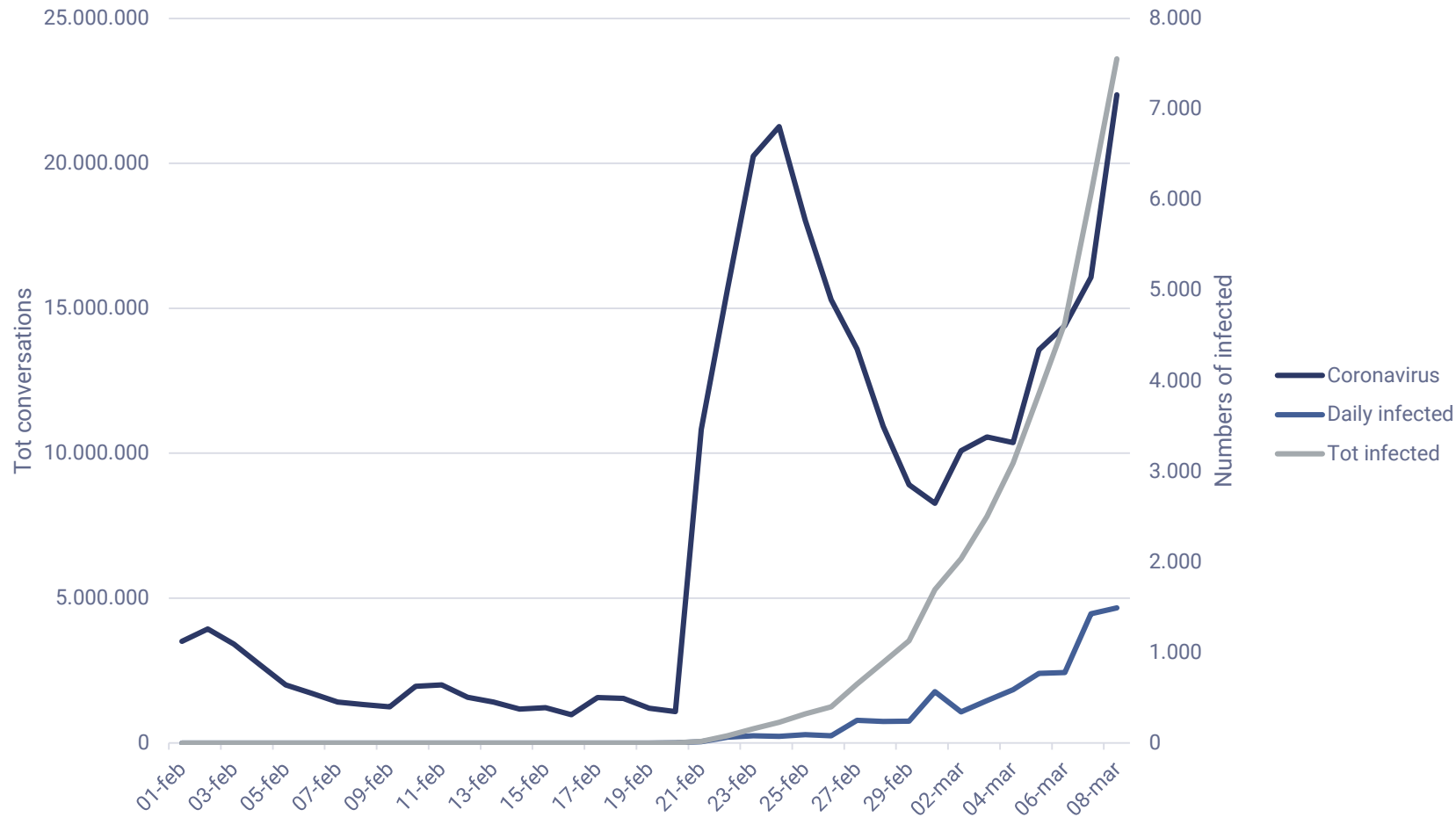
3. CONSUMER POINT OF VIEW

Web Listening

We're constantly listening the web in order to monitor conversation around Covid-19, sentiment and most common topics.



Over 300mio conversations about Coronavirus. From march 2nd the trend is growing due to the increase of infected and the Italy restrictive measures



Conversations peak was February 24th and on March 5th

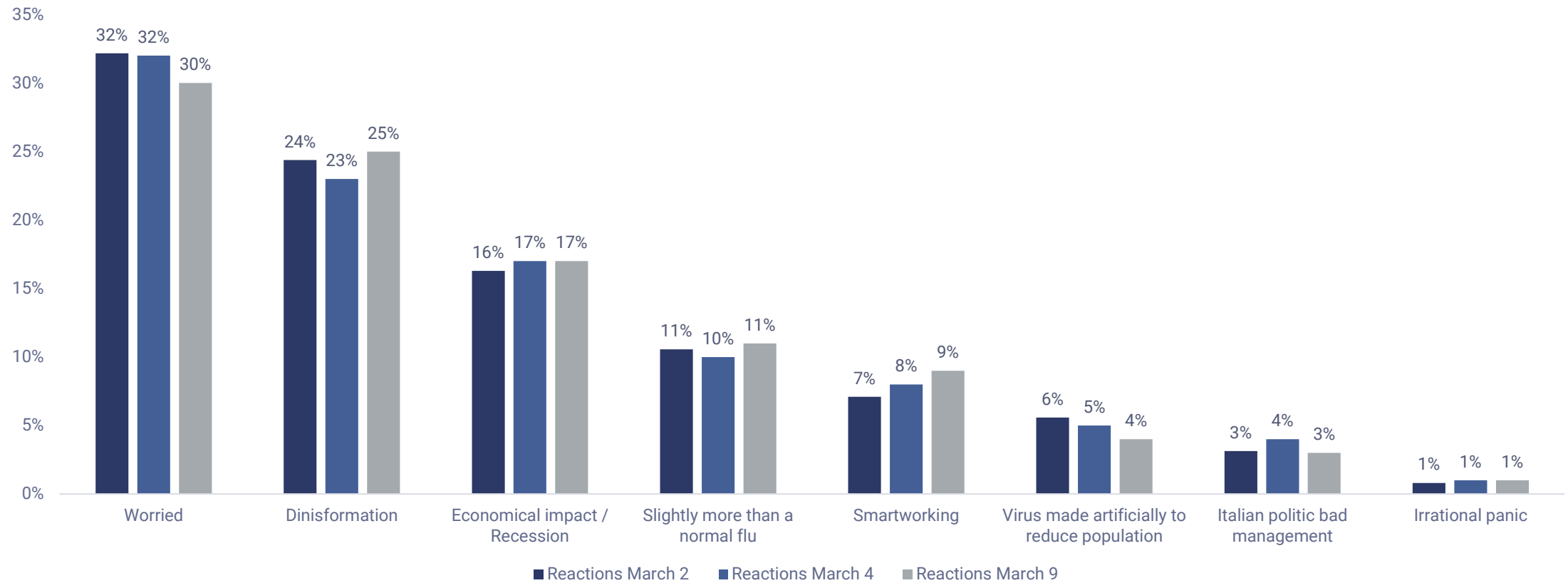
March 9th we detected over 25mio conversations.

With the rise of the infected in the last 4 days, the number of conversations grow accordingly.

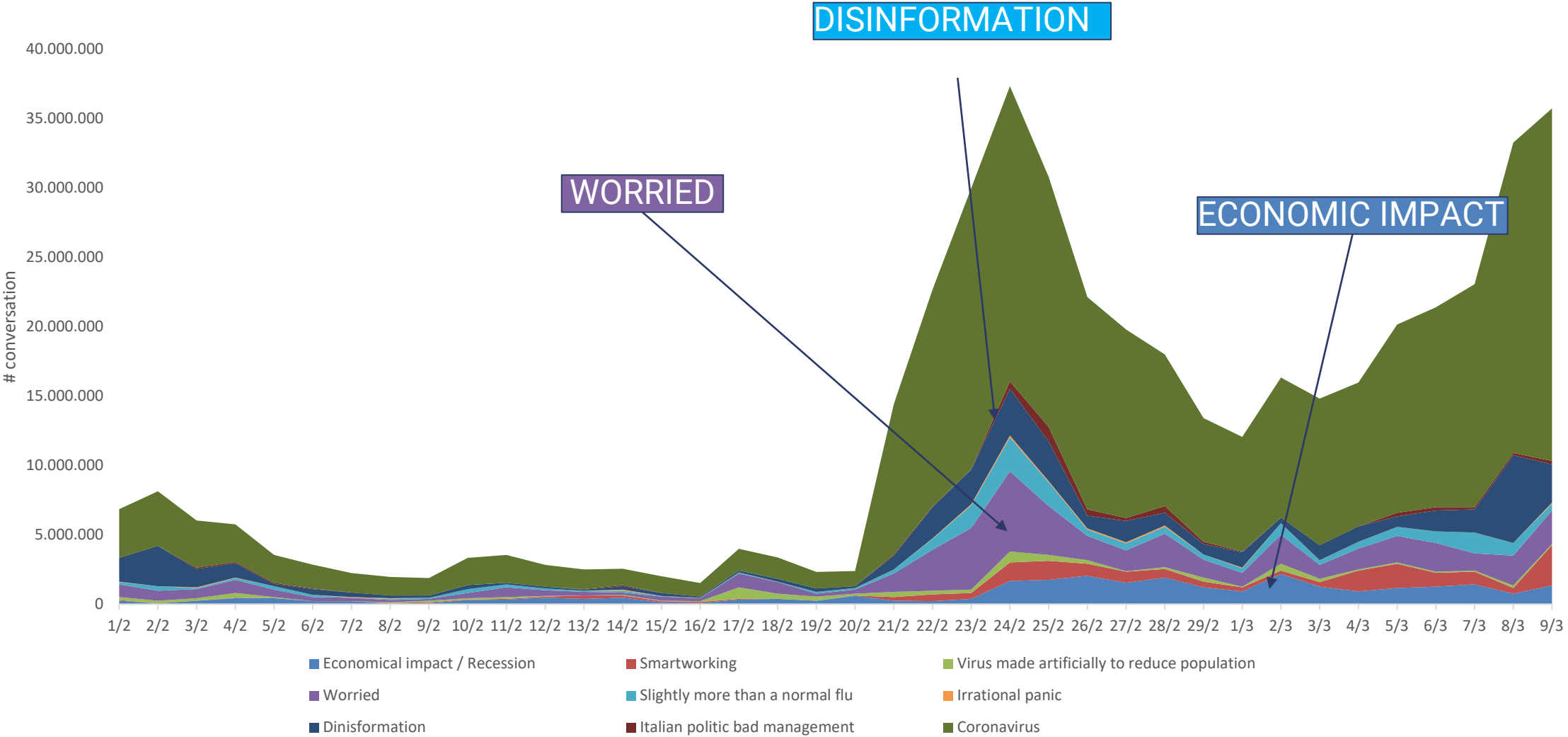


People seem worried and report general disinformation. In the last update grow smart-working, "normal flu" and disinformation issues

REACTIONS AND TOPICS



Conversation on 9th have reached the maximum peak. Disinformation grows due to the measured taken by the government



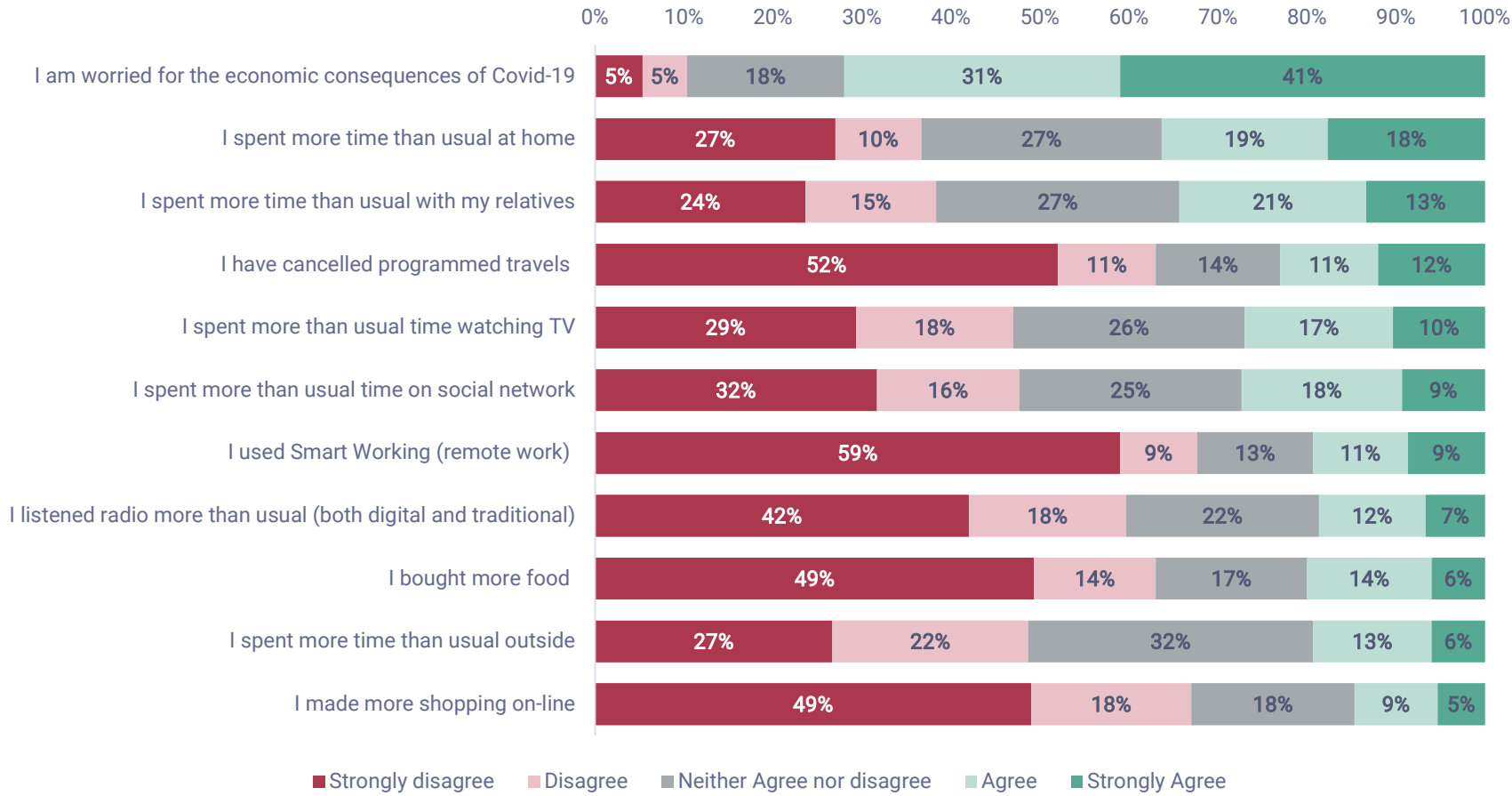
Consumer Survey

We have also asked to our proprietary panel (300 interviews per week) how do they feel about Covid-19.

We will update the data weekly.



What consumers think about Covid-19? They are worried and some habits are changing fast



72% are worried for the economic impact

37% stayed more at home

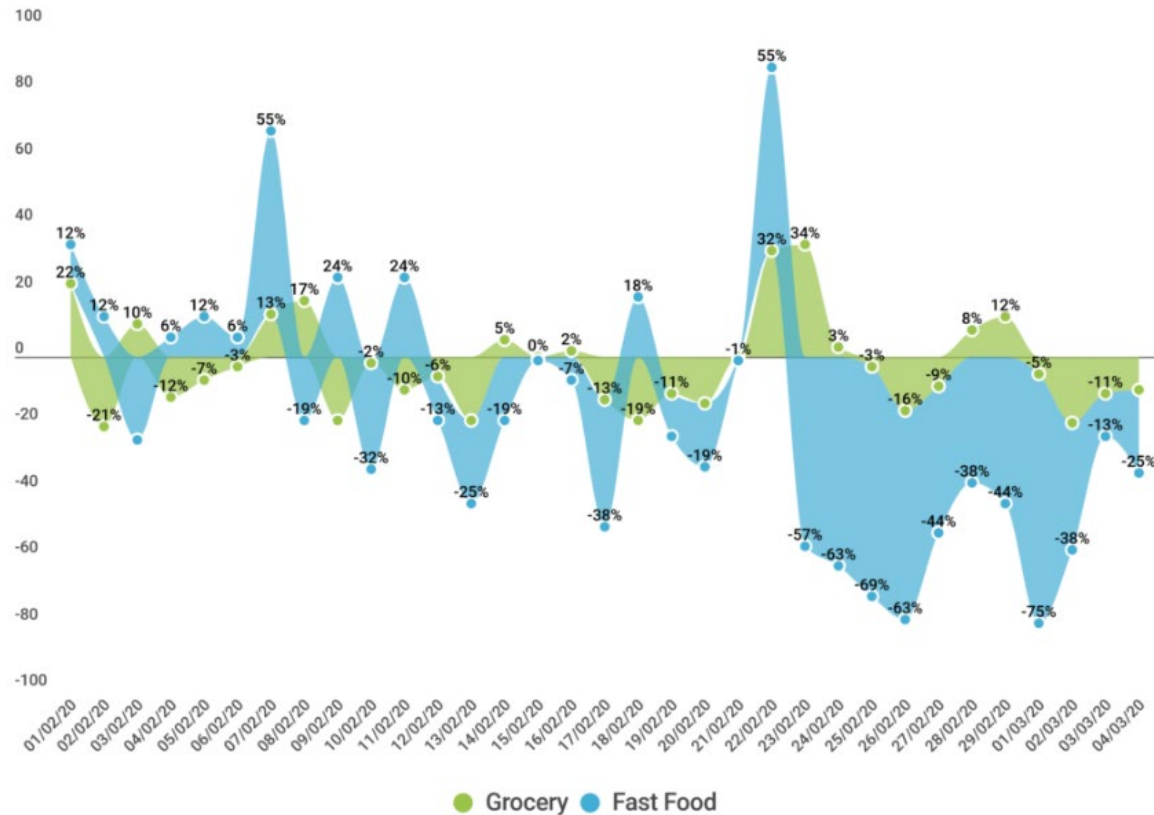
34% spent more time than usual with their relatives

Consumer habits in Milan

Thanks to smartphone App it was possible to make analysis on how the public places have changed in Milan in terms of people influx during the emergency.



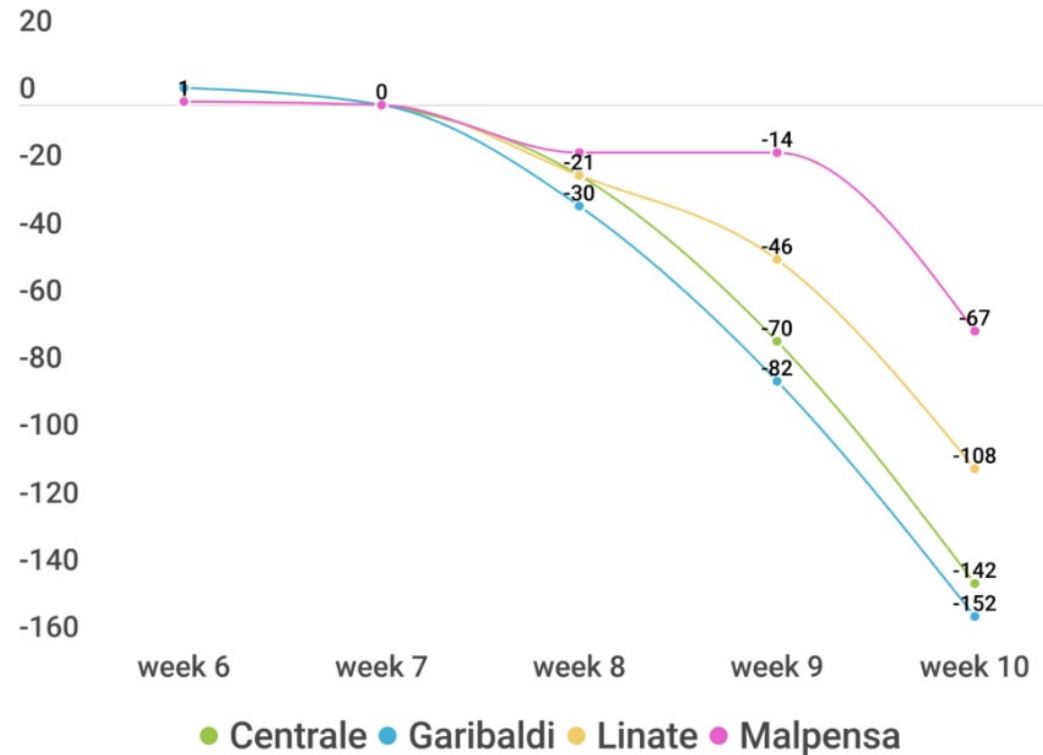
Fast-food have been strongly affected by the emergency in Milan



Supermarket are stable visited except for February 22th and 23th, when the first alarm arise and people assaulted grocery shops.

Fast-food have experienced a strong decrease from February 24th with -75% peak in terms of in-store visit (48% average).

Train stations and airports have experienced drops of people as well



Decrease in terms of people for Centrale and Garibaldi, the two main station in Milano.

Linate and Malpensa (airport in Milano), have experienced the same with a little delay.

4. BRAND REACTIONS

Some brands are sending empowering sponsored messages to the community



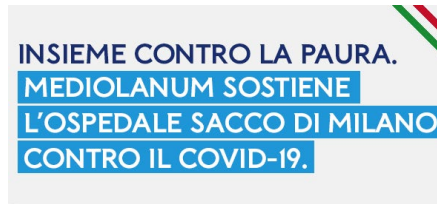
UniCredit Italia @UniCredit_IT
 #UniCredit supporta in ogni momento le economie locali e in particolare interviene a sostegno delle aree colpite dal virus #COVID19 ufficialmente identificate dalle autorità italiane. #UniCredit4People Info: bit.ly/3cfCEAJ



1 13 45
 Sponsorizzato

UNICREDIT – BANKING

"Unicredit is close to local economies and supports the most affected area by Covid-19 #Unicredit4People"



Di fronte all'emergenza sanitaria che sta attraversando l'Italia e la Lombardia in particolare, noi di Banca Mediolanum abbiamo deciso di devolvere da subito 100.000 euro, per sostenere l'Ospedale Sacco di Milano in prima linea nell'affrontare la crisi Covid-19. La somma sarà immediatamente disponibile per sostenere i reparti maggiormente esposti all'emergenza. Inoltre abbiamo aperto un conto corrente dedicato, dove ogni cittadino può versare il suo contributo utile all'acquisto di attrezzature, per la diagnostica e la ricerca, per il reparto di Microbiologia, Virologia e Bioemergenze dell'Ospedale milanese.

Da sempre noi di Mediolanum abbiamo contribuito a supportare i risparmiatori nelle crisi più importanti che hanno attraversato il mondo e il nostro Paese. E oggi, di fronte all'emergenza scatenata dal Coronavirus che sta arrecando gravi danni all'economia italiana, continuiamo a farlo.

CONTRIBUISCI ANCHE TU
 IBAN:
 IT9700306234210000001901901
 INTESTATO A: BANCA MEDIOLANUM
 CAUSALE: EMERGENZA CORONAVIRUS

Massimo Doris
 Amministratore Delegato
 Banca Mediolanum



MEDIOLANUM – BANKING

Mediolanum bank share their monetary support to the most involved hospital in Milan and ask the population to make donations.



Repower Italia @Repower_Italia
 Perché per fortuna anche l'energia positiva è contagiosa. #fatevicontagiare

**FATEVI
 CONTAGIARE.**

Dalle mani, lavate per almeno venti secondi, di chi lavora e non ha pensato neanche un secondo di tenerle ferme.

L'energia positiva è contagiosa.
fatevicontagiare.it

52 14 86
 Sponsorizzato

REPOWER – ENERGY SUPPLY

"Luckily, also positive energy is contagious. #getinfected"

Some brands are sending empowering sponsored messages to the community

Coronavirus

Esselunga dona 2,5 milioni di euro agli ospedali in prima linea contro il Coronavirus

I fondi finanzieranno il Sacco, il Policlinico ma anche lo Spallanzani di Roma e altre strutture



EUROSPIN / ESSELUNGA – SUPERMARKET CHAIN

They share their monetary support to fight the virus

Coronavirus: da Armani 1 milione e 250mila euro a ospedali

Anche a supporto attività protezione civile

Redazione ANSA

MILANO

08 marzo 2020

21:27

NEWS

Suggerisci

Facebook

Twitter

Altri

A+ A A-

Stampa

Scrivi alla redazione



• RIPRODUZIONE RISERVATA

CLICCA PER INGRANDIRE +

(ANSA) - MILANO, 08 MAR - Il gruppo Armani, a fronte dell'emergenza Coronavirus, ha deciso di donare 1 milione e 250mila euro agli ospedali Luigi Sacco, San Raffaele e Istituto dei Tumori di Milano, Spallanzani di Roma e a supporto dell'attività della protezione civile. Lo comunica lo stesso gruppo Armani. (ANSA).

ARMANI – FASHION BRAND

Armani share their monetary support to fight the virus

Sei in PARMA

EMERGENZA CORONAVIRUS

Barilla dona oltre 2 milioni di euro all'ospedale di Parma

Donate anche attrezzature mediche e logistiche a Protezione Civile e Croce Rossa. Il Gruppo a fianco dell'Italia che resiste: "A voi che ogni giorno ci fate sentire orgogliosi di essere Italiani, grazie, siamo al vostro fianco"

17 marzo 2020, 17:31



f t in p e

Il Gruppo Barilla è vicino all'Italia che resiste e al suo territorio. L'azienda alimentare fa sapere di aver effettuato una donazione del valore complessivo di oltre 2 milioni di euro a favore dell'Ospedale Maggiore di Parma, della Protezione Civile e della Croce Rossa di Parma.

BARILLA – FOOD BRAND

Barilla share their monetary support to fight the virus

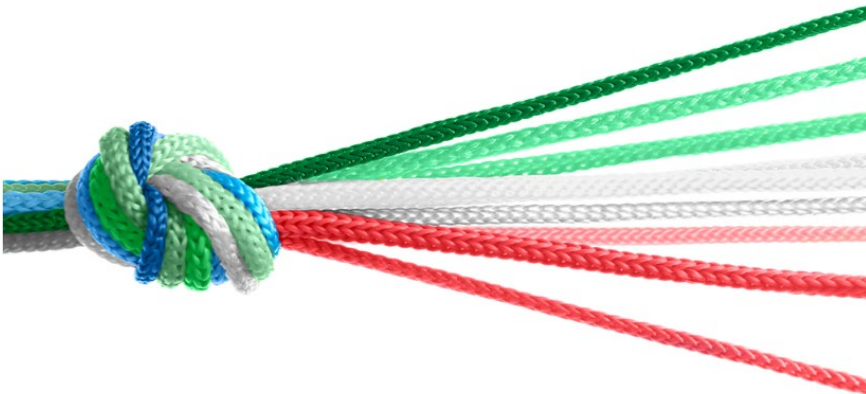
Some brands are sending empowering sponsored messages to the community

SNAM DONA 20 MILIONI A SISTEMA SANITARIO E TERZO SETTORE PER EMERGENZA CORONAVIRUS

12
MAR

12 marzo 2020 - 21:00 CEST

TAGS sistema sanitario, terzo settore, emergenza Coronavirus



Snam, anche attraverso Fondazione Snam, ha deciso di stanziare 20 milioni di euro per realizzare iniziative in favore del sistema sanitario italiano e del terzo settore per contrastare l'emergenza Coronavirus.

I fondi e le competenze di Snam saranno destinati a ospedali, strutture sanitarie e altri enti per acquisti di apparecchiature e beni necessari, per l'assistenza sanitaria e per supportare realtà del terzo settore che si occupano della tutela di giovani e anziani.

SNAM - INFRASTRUCTURE COMPANY

They share their monetary support to fight the virus

Bobo Vieri e Gillette insieme per la call to action #restoacasalikeabomber

Al via la raccolta fondi per l'acquisto di apparecchiature necessarie alla cura del coronavirus

di Lorenzo Mosciatti 12 marzo 2020

Condividi questo articolo



Obiettivo 100.000 euro. Per contribuire a far fronte all'emergenza Coronavirus sul territorio nazionale, **Bobo Vieri lancia insieme a Gillette Italia #restoacasalikeabomber**, una call to action che invita tutti i suoi follower a seguire la diretta del nuovo "Casa Vieri Show" che sarà trasmessa sul canale Instagram ufficiale di Vieri venerdì 13 marzo alle 17.00.

GILLETTE – PERSONAL CARE

Gillette with the brand ambassador Christian Vieri launches a call to action to invite all fans to follow the live broadcast of the new "Casa Vieri Show" via IG.

For each person who will connect to the broadcast, Gillette Italia will donate 1 euro (with the aim of reaching 100.000€)

Others are helping their consumers from the most affected regions with ad hoc offers



VODAFONE / TIM / 3-WIND – TELCO

The three most important telco providers are offering **illimited giga** for a month to their customers who live in the most affected regions by Covid-19.

Others are helping their consumers from the most affected regions with ad hoc offers and free entertainment

SMART WORKING

Connexia

CONNEXIA

Di cosa si tratta

Connexia mette a disposizione per due settimane l'uso gratuito della piattaforma di smart working

SERVIZI

Amazon Web Services



CONNETTIVITÀ

Eolo



CONNETTIVITÀ E SERVIZI

Tim



SMART WORKING

Cisco Italia e IBM

INFORMAZIONE E
INTRATTENIMENTO

Gruppo Mondadori



E-LEARNING

Amazon



SERVIZI

Italia Online



CONNETTIVITÀ

Vodafone



CONNETTIVITÀ

Fastweb



E-LEARNING

Weschool



INTRATTENIMENTO

Amazon Prime



VARIOUS BRANDS – TECH

A Lot of brands, through the Ministry of innovation technology and digitalization, are offering different free tech support to the red zones (i.e. sharing platform, free wi-fi, newspaper and magazine subscription, streaming services, ...)

Others are pushing services / products that capitalize on the "stay at home" forced situation



UN AIUTO CONCRETO

FINO A PASQUA CONSEGNA GRATIS AI CLIENTI CON PIÙ DI 65 ANNI

Dall'inizio dell'emergenza siamo in prima linea, vicini ai nostri clienti e al servizio della comunità.

Per questo motivo **consegneremo gratis ai clienti con più di 65 anni** le spese effettuate fino al 12 aprile su [esselungaacasa.it](https://www.esselungaacasa.it) e nei negozi con il servizio di [consegna a domicilio](#).



COOP and ESSELUNGA – SUPERMARKET

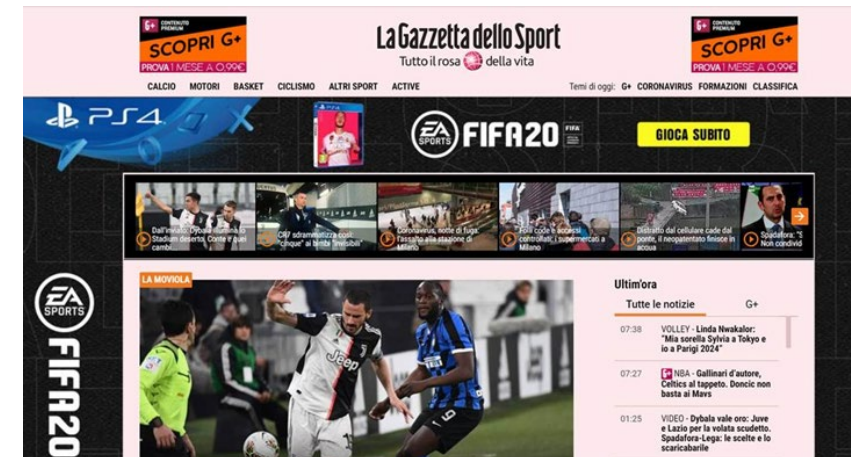
Coop and Esselunga are offering free delivery in Milan and other risky areas to over 65 years old people



**Fino al 3 marzo
la consegna è gratuita.**

McDonald's – FAST FOOD CHAIN

McD's is offering free delivery



SONY PLAYSTATION – TECH

Sony is pushing for FIFA 2020, a soccer game for Playstation came out in September 2019

Others are pushing services / products that capitalize on the "stay at home" forced situation



MENZ AND GASSER – FOOD

Menz & Gasser stress on the "stay at home" concept suggesting how to use their products.



BARILLA– FOOD

Barilla invites IG users to cook together with some chefs during daily Instagram live sessions



SWIFFER– HOMECARE

swiffer suggests a physical workout to do at home using the product

Adaptive advertising is capitalizing on the virus situation



WEROAD – TOUR OPERATOR

WEROAD, a travel service organizing mainly trip abroad for young people, is now pushing to discover the beauties of Italy and promotes "new express travel within Italy".



#IORESTOACASA e prenoto Nuova Kia Xceed

Sei a casa e non vuoi perderti i vantaggi su **Nuova Kia Xceed**,
l'alternativa sportiva ai classici SUV?
Non serve uscire: ora basta un click!

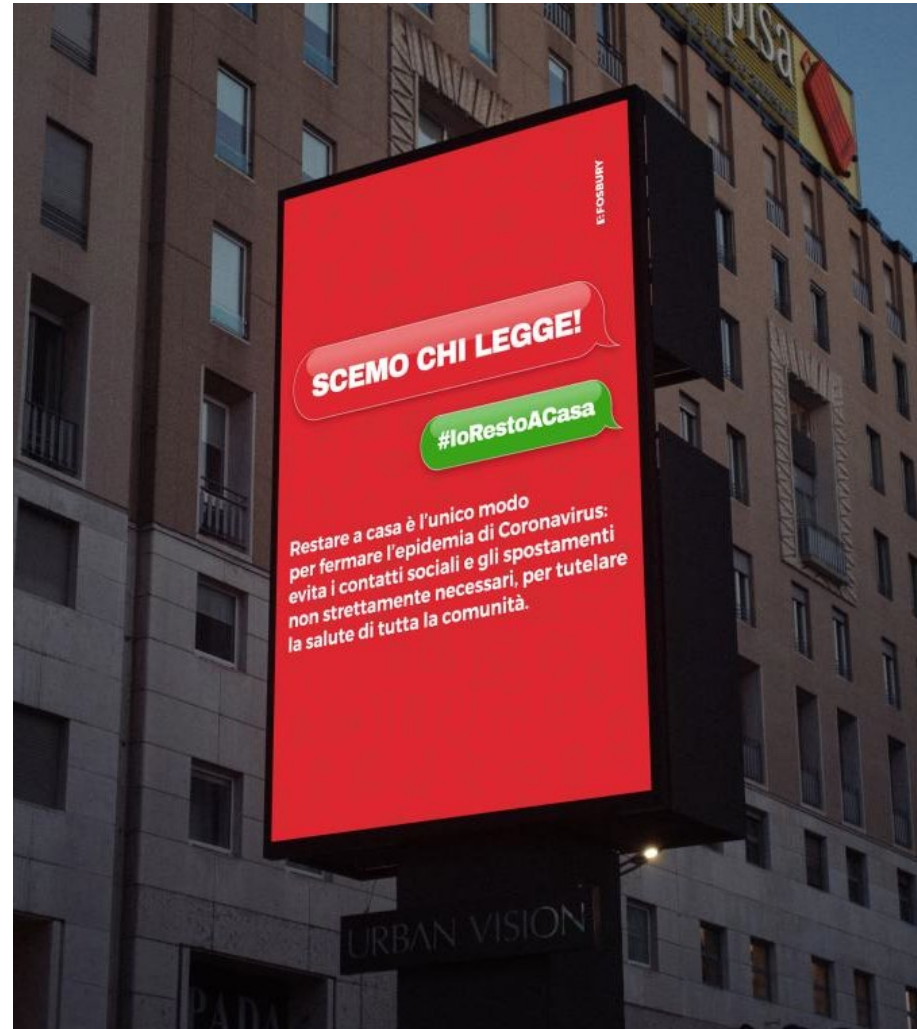
Prenota l'offerta da casa tua.
Fino a € 5.500¹ di vantaggi e tasso zero con SCELTA KIA, TAEG 1,00%¹.

Per bloccare l'offerta e ricevere il codice che ti permette di richiederla inserisci i tuoi dati nel form sottostante.
Il tuo Concessionario di zona ti contatterà o potrai contattarlo direttamente appena possibile.
Cosa aspetti? **Datti una mossa: hai tempo fino al 30 Aprile!**

KIA – AUTOMOTIVE

Kia offer the possibility to **book the new Kia Xceed "from home"** with a financial support

Others are activating communications to stimulate those who still go out



OOH CAMPAIGN #IORESTOACASA

The agency Fosbury is pushing with ironic OOH message “If you're reading this you must be stupid”, to highlight the importance of staying at home in this crucial moment

Some products are pushed more than others



SUPRADYN – PHARMA

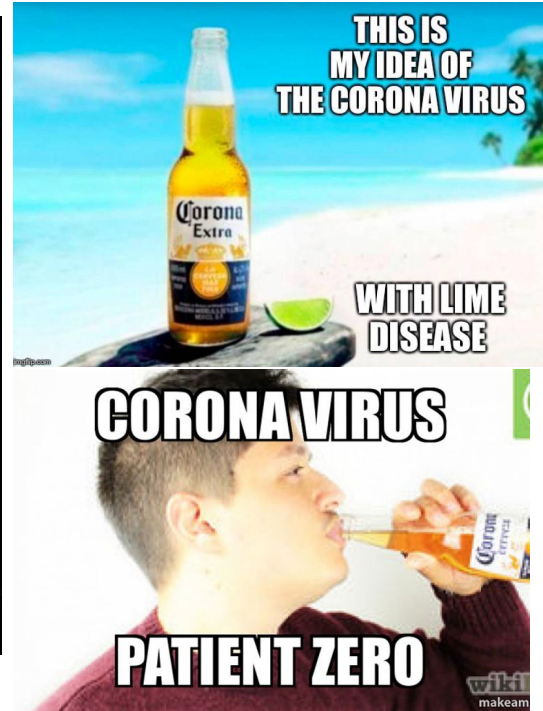
Vitamin supplements are pushed in order to help the immune system



IBM – TECH

IBM communicates an institutional campaign speaking about **health** and "intelligent solutions"

But one in particular is suffering only because of the "unfortunate" name



- shares on stock exchange are going down
- (-18,49%)
- 38% of the Americans would not buy Corona beer during the epidemic days
- 14% would not order a Corona beer in public

CORONA – BEER

Is losing a lot in terms of sales worldwide due to the unfortunate naming and the web meme produced after the Corona virus spread.

Lastly, some brands just had the wrong timing to push some messages #epicfail



stella crebb @StellaCrebb · 7 mar
Perché **#crodino** non ferma la sua campagna pubblicitaria?



2



CRODINO – BEVERAGE

Crodino –a famous non alcoholic drink- is on air with a brand new spot with multiple messages of: **stay human, give us a hug as big as the world, give us a hug.**

Due to Corona Virus the law has imposed to maintain a **distance security** from each others and for that reason the commercial has received **strong criticisms** from the web and **many people are asking to cancel it.**



• **Rego** • @RegoLogik · 7 mar

In risposta a @IlCrodino

Certo che invitare tutto il mondo ad abbracciarsi in questo periodo di **#coronavirus** non mi sembra il massimo... non era il caso di rinviare l'uscita di questo spot? È veramente un controsenso.



1



1



🇧🇷 **Stupor Mundi GTV** 🇧🇷 @Stupormundi66 · 5 mar

Proprio adesso che non si può più fare, lo scimmione del **#crodino** vuol farci abbracciare tutti.

Tempismo perfetto.



6



Stefano Montanaro @Padfoot1984 · 7 mar

Decreti per stare a un metro di distanza, niente contatti, state a casa, così non favorite il propagarsi del **#coronavirus** e **#crodino** che fa? Una pubblicità dove incoraggia le persone a uscire e abbracciarsi. **#geni** ne abbiamo? 😂



1



Francesco Ropa @FrancescoRopa · 5 mar

Certo che come tempismo la pubblicità di **#crodino** non poteva essere peggiore!

