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COVID-19 LANDSCAPE OVERVIEW

SUMMARY INSIGHTS & RECOMMENDATIONS

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- We believe the **worst impacts will begin to lessen in 4-6 weeks** if the US follows a similar trajectory to China, which we think is the best proxy
- **Media primarily consumed in-home** will see **increased time-spent and importance**
 - UP: Streaming video and audio, desktop traffic, linear TV and radio, social media
 - DOWN: Out of Home, mobile
- Where possible, **retain some spend in programmatic to avoid lengthy restarts**; these campaigns get smarter over time and take time to restart
 - Adjust budgets and expectations for lower volume against “in-market” audiences, but be poised to lead when demand returns
 - In the interim, interest-based targeting can help replace lost impressions
- Consumers will change behaviors in ways temporary and lasting, and in either case they still expect to interact with brands
- Brands will be **rewarded for offering utility** to disrupted consumers, but **extra care should be paid to creative and messaging**

3 AREAS TO POSITION FOR NEAR TERM RECOVERY

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1

MARKETING—

Flexible, fast-response marketing investment

- Avoid removing all ads, reprioritize marketing channels during the outbreak.
- Plan “bounce-back consumer consumption” campaign in advance, quickly pick up ad spending post-outbreak
- Remain active on algorithmic/programmatic buying channels to minimize restart lags

2

BRAND—

Adjust communication message to track consumers

- Leverage PR to demonstrate a “reliable” brand image
- Develop messaging on how brands help society heal and rebuild
- Craft product story around “home & healthy” and create new selling points
- Build on positive image and continue to win customer support

3

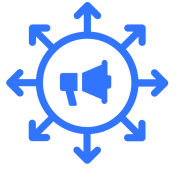
VALUE CHAIN—

Build value chain preparedness for a bounce-back

- Build-in increased demand into production planning as soon as end of outbreak is in sights

KEY MESSAGING CONSIDERATIONS

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When times are good, you should advertise. When times are bad, you must advertise: History shows that businesses that stop advertising in times of crisis or economic downturn are likely to lose share of mind, heart and market. Stay present with your audiences, but acknowledge the issue at hand in both message and tone. Be the leader they want you to be.



Be sensitive to public sentiment: When consumer worries are escalating, audiences are simply not as receptive to promotional messages. Be transparent in communicating how your business is being responsible during the public health crisis. Be empathetic to listeners. You may need to trade promotional time for statements about your strict adherence to CDC guidelines and your business' unwavering commitment to the community it serves. This is always budget well spent.



Inform and be helpful: Despite changing typical patterns, consumers still have needs. Inform your audiences of what you have in stock and remind them what they might need to be prepared and to continue their daily course of life. Deliver messages of support and outcome, not ones that can fan the flames. This is how you earn trust and brand loyalty.

COVID-19 LANDSCAPE OVERVIEW

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1
**POLICY
RESPONSE**



2
**COMMERCIAL
IMPACT**



3
**SHIFTS IN
CONSUMER
BEHAVIOR**



4
**SHIFT IN MEDIA
CONSUMPTION**



5
**HOW BRANDS
ARE
RESPONDING**



6
**INSPIRATION &
RESILIENCE**

COVID-19 LANDSCAPE OVERVIEW

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1



POLICY RESPONSE

Government Response
How long will it last?

2



COMMERCIAL IMPACT

3



SHIFTS IN CONSUMER BEHAVIOR

4



SHIFT IN MEDIA CONSUMPTION

5



HOW BRANDS ARE RESPONDING

6



INSPIRATION & RESILIENCE



GOVERNMENT RESPONSE TO THE OUTBREAK

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CONTAINMENT AND MITIGATION

Self-Quarantine
Event Cancellations
Social Distancing/WFH
Non-Essential Business
Closures
School Closures
Shelter in Place (SF,
potentially NYC)

CAPACITY

Resources (food,
supplies, etc.)
COVID19 Testing
Medical Care
Economic Relief
Healthcare Capacity
(beds, ventilator)

COORDINATION & COOPERATION

G-7 (global)
Federal
Regional
State
Local
Private Sector



THREE SCENARIOS FOR HOW COVID-19 COULD EVOLVE — *swell* SHARK

Quick recovery

Late Q1

- **Ex-Hubei China** economic restart >80% relative to pre-outbreak levels, with large industrials leading while small-medium enterprises slower
- **Hubei** starts to return to normalcy in March; result of a large-scale health response having an effect
- **Community transmissions** in East Asia (South Korea, Japan, Singapore) and Europe (Italy, etc.) are brought under control

End Q2

- **Community transmissions** in Middle East are controlled
- **Consumer confidence** starts to return, even in setting of community transmissions, due to lower case fatality ratio, case growth slowdown, promising treatment options; consumer demand persists, especially in certain sectors (e.g., food, necessities via online channels)

Mid Q2

- **Cases peak** in multiple regions; evidence mounts that the virus is not resilient to seasonality **Aviation, tourism, hospitality** sectors back to normal as countries lift travel bans

Intra-complex transmission contained; economic impact mostly restricted to Q1

Global Slowdown (Base case)

Late Q1

- **Continued path to recovery in China. Ex-Hubei China** economic restart >80% relative to pre-outbreak levels, with large industrials leading while small-medium enterprises slower
- **Moderate decline in private consumption** and exports of services

Early Q2

- **China at near-complete economic restart by Q2. Hubei** is back to normalcy, a result of a large-scale health response and containment measures having an effect
- **East Asia, Middle East, and Europe** see continued case growth, contributing to perception of “leakage,” impacting economic growth in all three regions. Each goes into lockdown, either government, company, or self-imposed. Early Q2 is the first time they see a reduction in new cases in certain complexes. **Newer complexes** see localized transmission

Late Q2, Q3

- **Consumer confidence dampened through Q2 and potentially Q3.** Demand recovery depends on evolution of disease, considering potential impact of seasonality, fatality levels
- **Impact and recovery** differs by sector—e.g., aviation, tourism, hospitality sectors longer to rebound than consumer goods

Sustained intra-complex transmission. Global slowdown in 2020 – growth at 1.8-2.2%, down from 2.5% growth envisioned at beginning of year

Global Pandemic and Recession

Late Q1

- **Ex-Hubei China** economic restart >80% relative to pre-outbreak levels, with large industrials leading while small-medium enterprises slower

Early Q2

- **Hubei** starts to return to normalcy, a result of a large-scale health response and containment measures having an effect

Mid-Late Q2

- **Generalized, global spread – East Asia, Middle East, and Europe** transmission complexes all see continued case growth until mid-Q2, potentially with less robust health / containment response; mid-to-late Q2 is the first time they see a reduction in new cases
- **COVID-19** resistant to seasonal effect, or results in higher transmissibility, before health systems can detect and react effectively at scale; continues to expand to other parts of the world

Q4

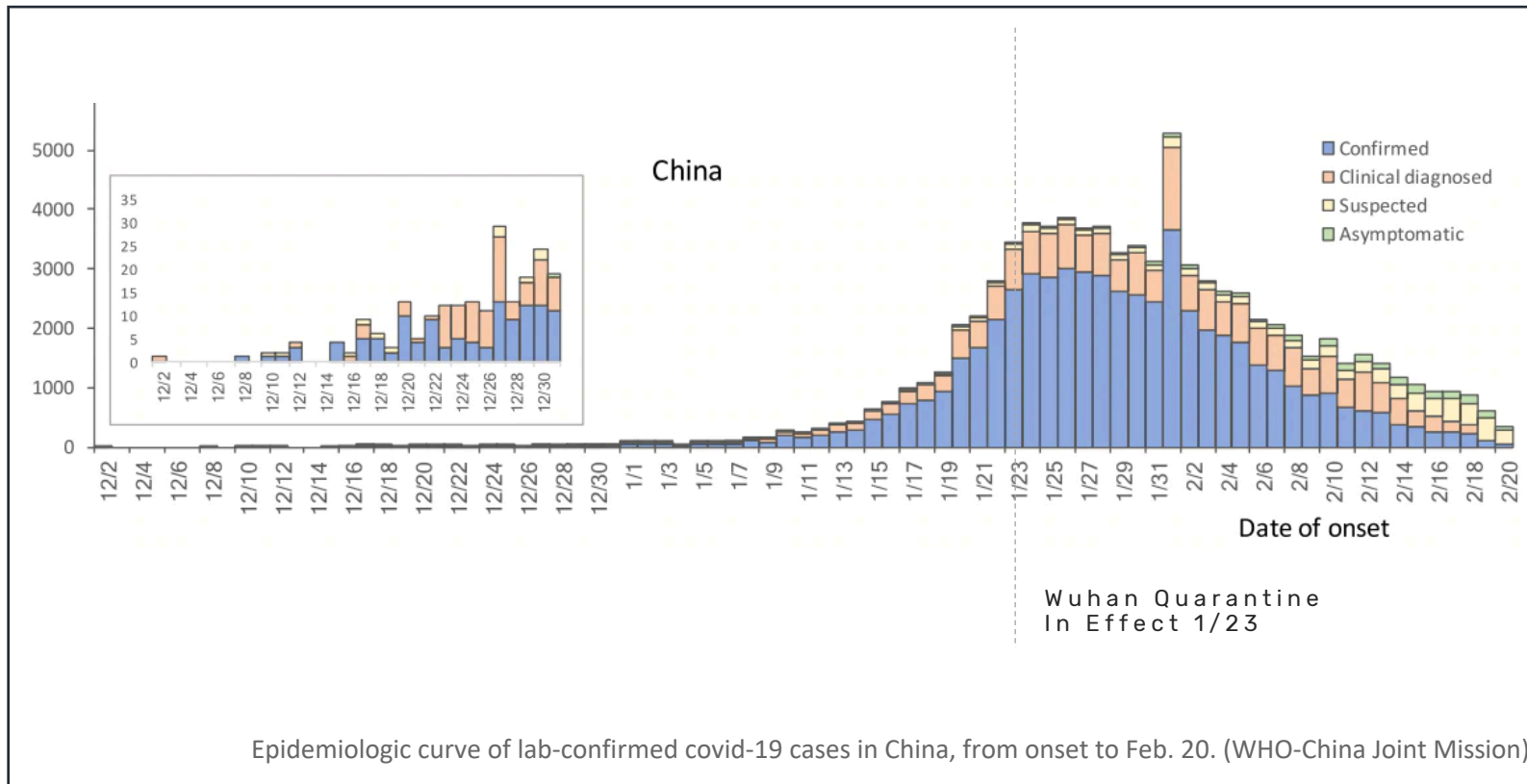
- **Substantial demand shock that lasts through bulk of year –** fall in private consumption, level of exports and services, financial market “contagion”
- **Consumer confidence** remains anemic, although certain sectors might recover earlier; air travel restrictions remain in place until late 2020

Transmission jumps, new complexes. Global pandemic drives a recession that lasts bulk of the year



HOW LONG WILL IT LAST?

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It took China roughly two months from the beginning of its outbreak — and a month from the time the gravity of the situation was understood — for the country to reach its peak. And it took South Korea roughly half a month.

- *Washington Post*

China started seeing **reversal of cases 4 weeks** post quarantine and **8 weeks post initial panic**

We do not pretend to be epidemiologists, but considering America's size, multitude of government layers (federal, state, local), lack of testing availability and new shelter in place restrictions, it looks like the US is on the same trajectory as China

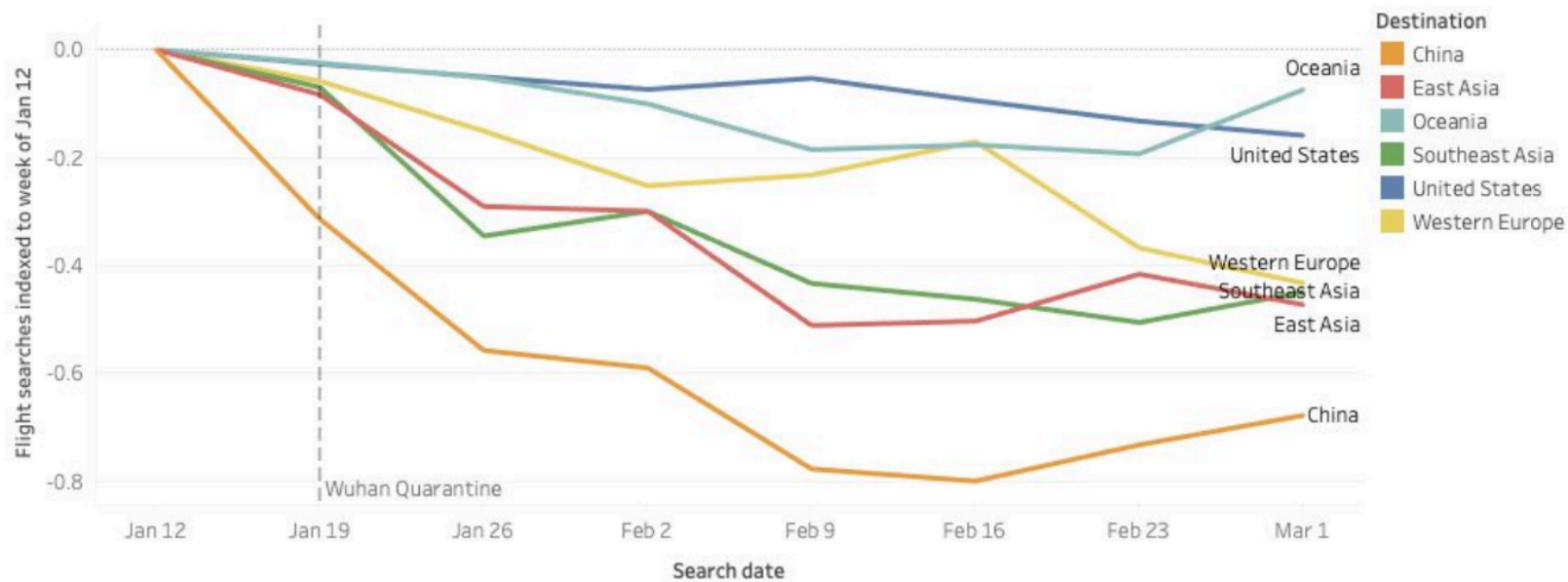


HOW LONG WILL THIS LAST?

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In-market travel decline reversed 5 weeks post quarantine and 8 weeks post initial panic

YoY Change in Weekly Flight Search



Source: Sojern Flight (Airline/OTA/Meta) Data, Flight searches Jan 12–Mar 7, 2020 vs Jan 13–Mar 9, 2019

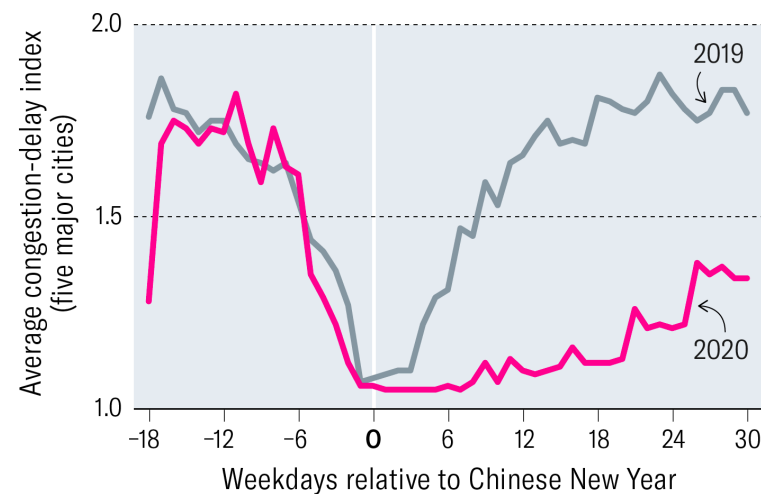
Search is still down 60% from a year ago, 10 weeks post panic



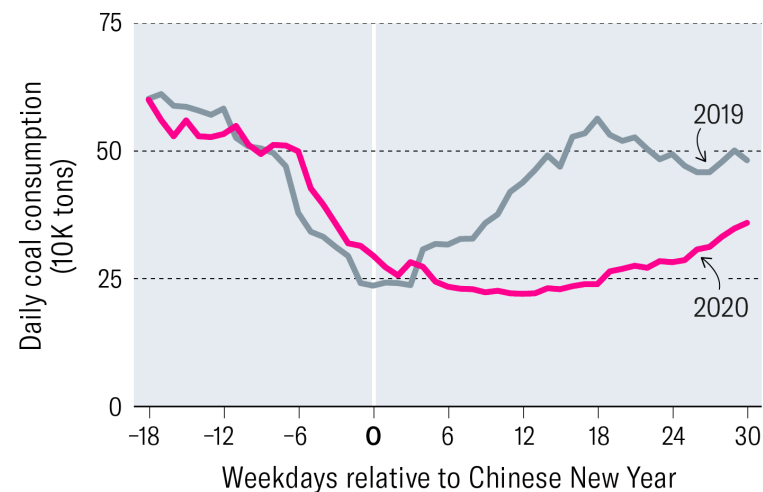
CHINA IS SHOWING EMERGING SIGNS OF RECOVERY

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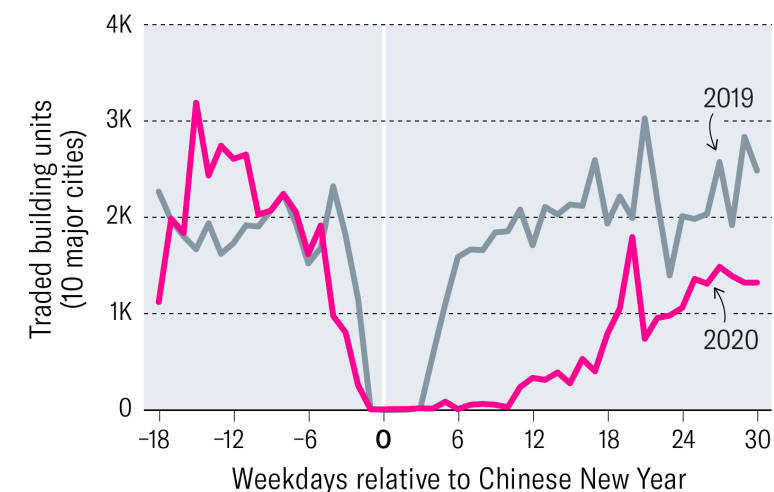
People and goods are starting to move again.



Coal consumption is increasing, which indicates that production is resuming.



Property transactions are resuming, signaling that confidence isn't broken.



Note: Data re-based for weekdays excluding weekends relative to start of Chinese New Year (Feb. 5, 2019, and Jan. 25, 2020). Cities in the congestion-delay index are Beijing, Shanghai, Guangzhou, Shenzhen, and Wuhan. Daily coal consumption is the sum of averages from Jerdin Electric, Guangdong Yudean Group, Datang International Power Generation, and Huaneng Power International. Cities analyzed for building units traded are Beijing, Shanghai, Guangzhou, Shenzhen, Hangzhou, Nanjing, Qingdao, Suzhou, Nanchang, and Xiamen.

Source: Wind, cqcoal.com, and BCG Center for Macroeconomics

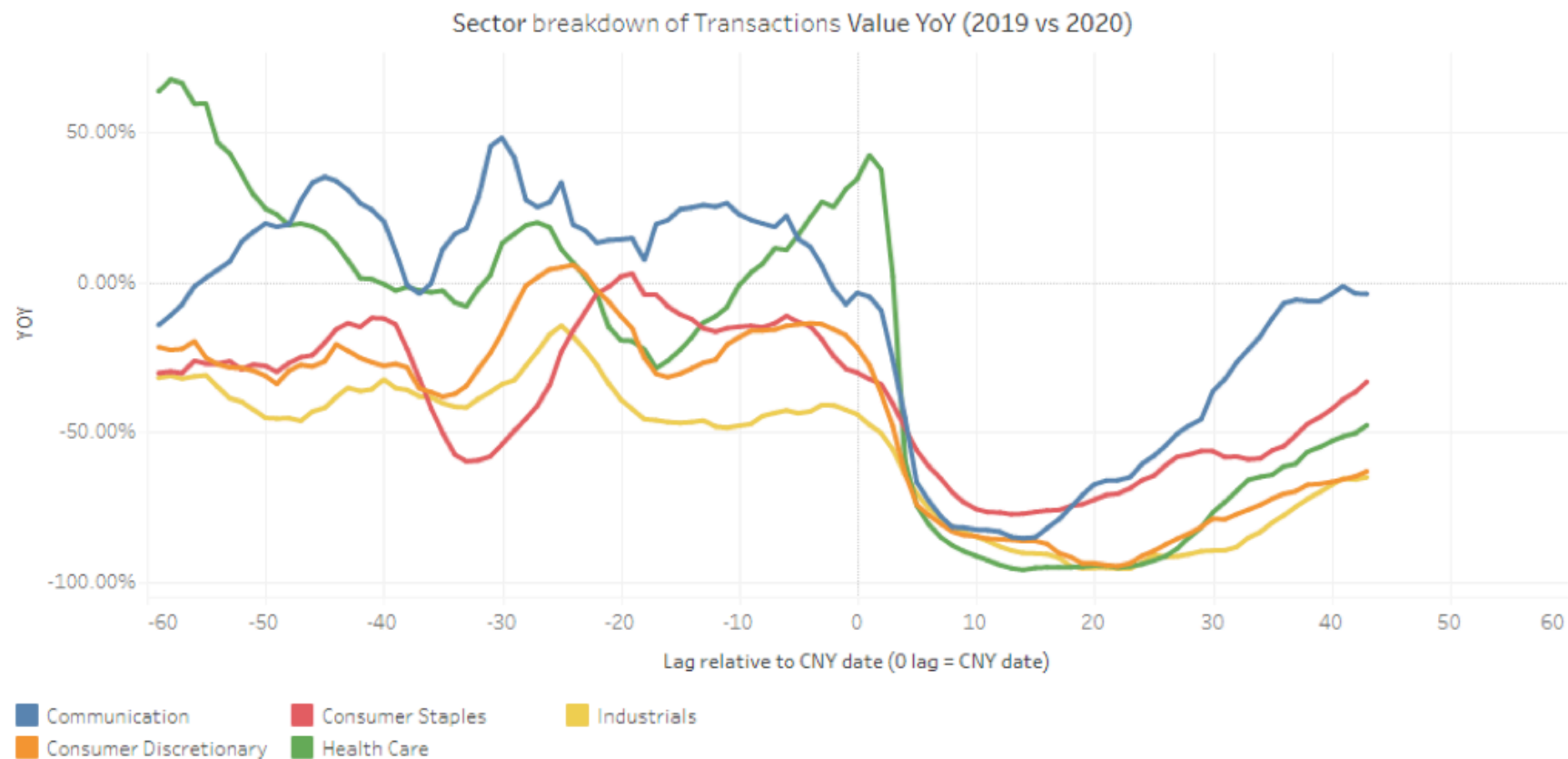




— AND SPENDING IS RESTARTING ACROSS THE BOARD —







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Mainland China spending by sector: there is definitely a pick up across the board, finally. Staples, leading discretionary and Industrials (which are travel related).



COVID-19 LANDSCAPE OVERVIEW

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- 1  POLICY RESPONSE
- 2  **COMMERCIAL IMPACT**
- 3  SHIFTS IN CONSUMER BEHAVIOR
- 4  SHIFT IN MEDIA CONSUMPTION
- 5  HOW BRANDS ARE RESPONDING
- 6  INSPIRATION & RESILIENCE

A look at key industries



ESTIMATED LENGTH OF IMPACT BY INDUSTRY

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Estimated degree of impact, in terms of duration



Tourism & Hospitality



Aviation / Airlines



Automotive



Oil and gas



Consumer products



Consumer Electronics & semi-conductors

Longest

Estimated global restart

Q4

Late Q3 / Early Q4

Q3

Q3

Q2

Q2

Key Insights

“Travel slowdown to and from major Asian travel hubs (20%+ YoY decrease) and **select European destinations** (e.g., France), coupled with decrease in **Chinese tourism spend** (\$277Bn, 16% of international tourism spend in 2019), likely to reduce demand globally (up to 40% decline 2020 output) until disease is “under control” across transmission complexes, likely far into Q4
Hospitality sector could **proactively protect and prepare its people**, anticipate near-term **fall in demand**, prepare to manage **reputational risk** and review **annual planning** in anticipation of long-term impacts.”

“Travel restrictions, drop in consumer confidence, corporate policies to limit mass gatherings and non-essential travel are acutely impacted industry
Impact across airlines to vary, with smaller airlines with low margins and smaller cash reserves more at risk, but larger **global network at risk is suggesting much broader, prolonged slowdown**
As with tourism, expected recovery to be faster for **domestic travel** (~2 quarters), longer for **international** (~3-4 quarters), if not longer based on disease evolution”

“Signs of **ongoing disease expansion in Europe** (2nd largest global automotive producer, 6.1% of total EU employment) to amplify impact, despite ongoing Chinese economic restart. Likely to **compound existing market vulnerabilities** (e.g., trade tensions, declining sales) Headwinds faced likely to persist into Q3 given **tight inventories** (fewer than 6 weeks) and **complex supply chains** (and thereby minimal ability to shift supply chains)
Hubei province accounts for **9% of total Chinese auto production** (incl. global automakers and component parts), disrupting global supply chains until activity fully resumes”

“Uncertainty and reduced industry activities (~20% decline in Chinese demand), compounded with travel restrictions and **recent spread to Middle East**, have led to a drop in prices, where up to 50% is attributed to global slowdown
Industry restart will be highly dependent on improved markets and Chinese demand, as the world’s **2nd largest oil consumer and largest importer of liquefied natural gas**
Lower short-term prices could lead to sharp increases in prices as demand rebounds and supply lags – companies could prepare contingency plans, including employee protection”

“Global slowdown in demand to improve and consumer confidence to recover when **disease is perceived “under control”** – seeing sustained demand in China (e.g., express delivery, food delivery, though hampered by labor shortage)
Retailers with thin margins in affected areas likely to face severe **drops in demand** and, in parallel, **liquidity and working capital constraints**, forcing companies at risk (especially smaller and medium-sized enterprises) to lay off workers or dock salaries
Risk mitigation by pursuing **online / omnichannel strategies** given accelerated trend in consumer behavior”

“Existing **market structure** already in middle of shifting (e.g., given recent trade tensions, moves to diversify supply chain), and likely to be **exacerbated into Q2**
Wuhan – a hub for semiconductors and fiber-optics is **critical in supply chain** worldwide – and **shutdowns are impacting sites downstream**
28% of South Korea exports are electronics, leading to **further supply chain disruptions** if increases in-country transmission, despite a China restart
Recovery will **differ by sub-segment**, depending on labor-intensity and availability of dwindling inventory (e.g., 2-6 weeks estimates for semiconductors)”

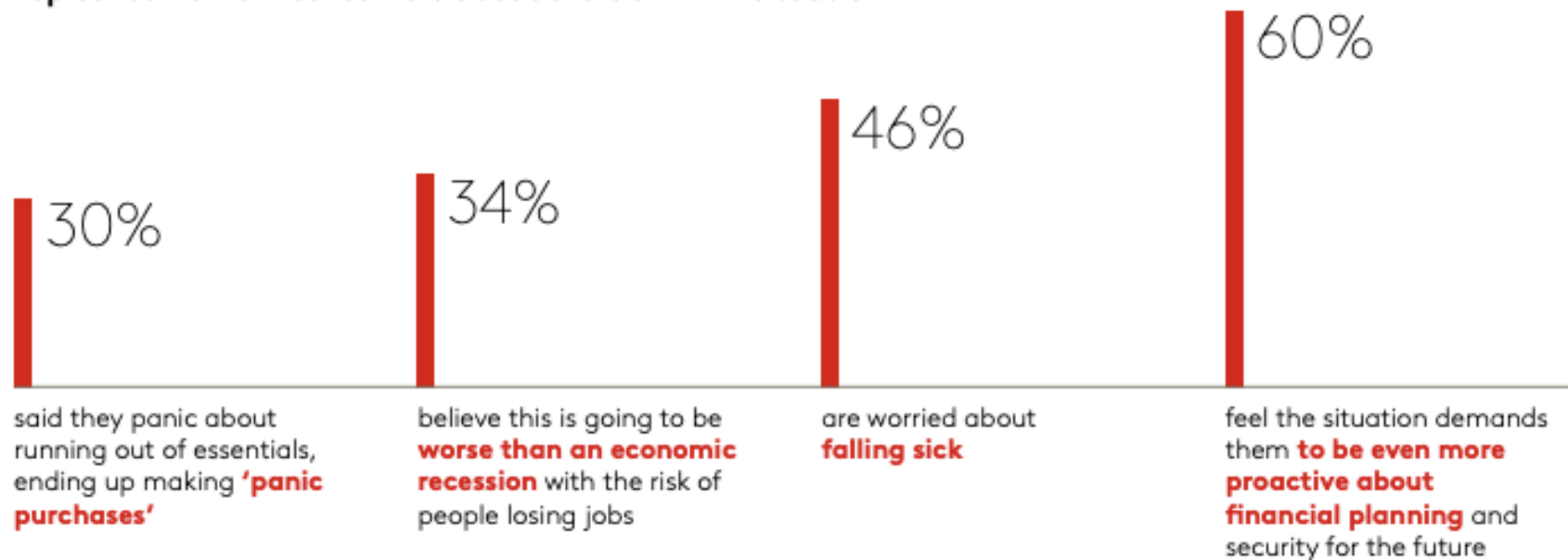


TOP OF MIND CONCERNS FOR CONSUMERS ARE AROUND FINANCIAL PLANNING AND SECURITY

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Financial Services

Top concerns from consumers about the COVID-19 situation



BANKING AND FINSERV: SMALL BUSINESS OWNERS ARE WORRIED, AND LENDERS NEED TO FIND WAYS TO REASSURE THEM

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Financial Services

"I have seen a 25% increase in loan demand this week alone ... There is fear in the market that liquidity might dry up, so business owners want more cash in hand to weather a host of uncertainties ... I see this across all sectors, not just restaurant, travel, tourism, hotels, and logistics. I see this even in the healthcare sector. It's scary, and it's changing by the hour." - Biz2Credit president, Rich Arora, March 12

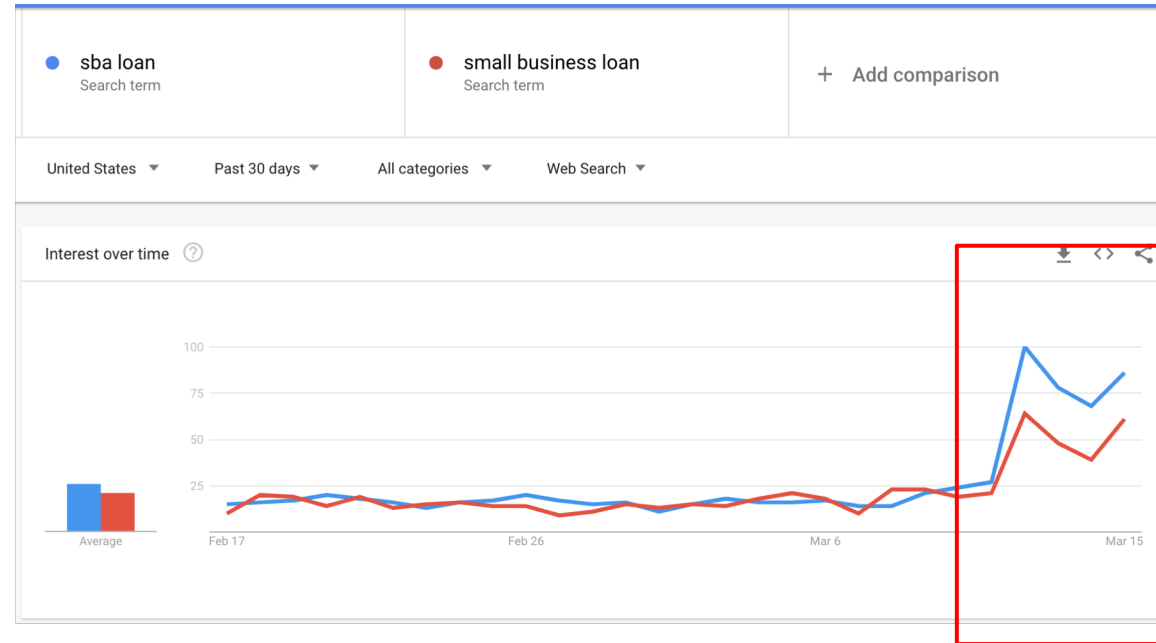
From March 13 — March 16, Chris Hurn, CEO of Fountainhead (one of 14 US nonbank SBA lenders) had 280 loan enquiries, which he said is unprecedented. He's also created a webinar for entrepreneurs and has already had 450 sign up. He said, "People are freaking out and they are panicking, and if we are not already at martial law beyond a few states, it'll sweep the rest of the country. No one will be doing much business except SBA lenders."

According to a National Small Business Administration survey conducted week of March 9, 75% of small business owners say they are very concerned about the economic impact of COVID-19 ... More than half are now anticipating a recession in the coming 12 months, compared to just 14% in January. 38% say they are not confident in the financial future of their business compared to just 15% in January.

BANKING AND FINSERV: SMALL BUSINESSES ARE TRYING TO SECURE LOANS TO SAVE THEIR BUSINESSES

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Financial Services



Increase in searches for “sba loan” and “small business loans” increased in the last 7 days

Google Trends, March 17, 2020

44% of SMBs have not taken measures to prepare for reduced spending and with consumers spending will decrease.

SMBs will have to turn to loans to bridge the demand gap.



WITH TRAVEL RESTRICTIONS IN FULL EFFECT, THE OUTBREAK HAS HIT THE TRAVEL INDUSTRY HARD

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Travel

Year-over-year change in weekly US travel sales

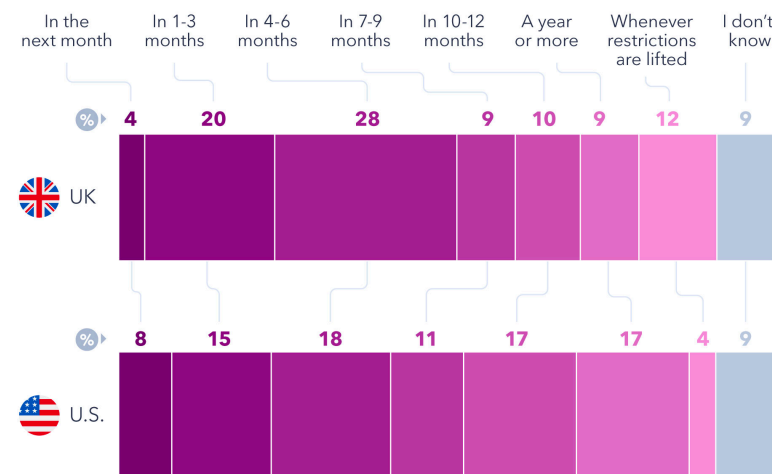
	Jan. 7-13	Jan. 14-20	Jan. 21-27	Jan. 28-Feb. 3	Feb. 4-10	Feb. 11-17	Feb. 18-24	Feb. 25-Mar. 2
Online travel agencies	2.1%	16.6%	-0.4%	-1.9%	9.1%	7.8%	-6.2%	-20.5%
Airlines	5.6%	3.2%	4.9%	-5.7%	-4.0%	0.5%	-7.4%	-16.5%
Cruise lines	0.6%	3.1%	13.4%	-3.9%	-12.2%	-11.1%	-6.4%	-14.9%
Hotels	7.5%	11.6%	12.1%	6.2%	4.6%	7.6%	3.4%	-0.6%

Source: Earnest Research

recode BY Vox

Anticipation of future booking timespan

% of U.S./UK internet users that have delayed/cancelled trips that plan to look again in the following timespan



Question: You've said that you've cancelled or delayed a booking. How long do you think it will be before you look into having a vacation again? Source: GlobalWebIndex March 13-16 2020
Base: 911 (U.S.) & 599 (UK) internet users that have cancelled/delayed trips due to coronavirus

As a result many are pushing their travel plans at least to the next 7-9 months, while being cognizant that they are contingent on government restrictions



WITH SO MUCH UNCERTAINTY AROUND TRAVEL RESTRICTIONS, MANY HAVE CHOSEN TO SAVE THEIR 2020 VACATION FUNDS

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Travel

Consumers saving their 2020 vacation funds

% of U.S./UK internet users that have delayed/cancelled trips who plan to do the following with the money



Once restrictions are lifted, brands will need to work harder to convince consumers to open their savings back up to travel and vacation

Question: Which of the following will you be doing with the money you were planning to invest in your vacation? **Source:** GlobalWebIndex March 13-16 2020
Base: 911 (U.S.) & 599 (UK) internet users that have cancelled/delayed trips due to coronavirus



SPENDING HAS SHIFTED AWAY FROM NON-ESSENTIALS BUT BRANDS NEED TO BE PREPARED FOR BOUNCE BACK CONSUMPTION

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Fashion & Apparel



During the week of 3/2, total retail traffic fell 9.1%, apparel retail traffic fell 3.9% and luxury retail traffic declined by 14.7%

As businesses responded to potential increase in acceleration of the spread, several brands (large and small) shuttered brick and mortar stores



As consumers adjust to staying home, many are diverting their discretionary spending for stocking up, temporarily reducing spending on non-essential goods



Many brands and department stores are running sales to minimize inventory and stimulate spending



— OUR VIEW ON HOW BRANDS CAN RESPOND

— *swell* SHARK

Fashion & Apparel

- 1. Promote more relaxed clothing for people to wear while they are in lockdown and adapting to WFH**
- 2. Lean into long-lasting nature of clothing/versatile range, minimizing the need to purchase multiple**
- 3. Move the shopping ecosystem online by providing consumers with the same support they would get in store through online pop-up stores, digital sales associates and communication**
- 4. Even if sales slow, apparel sales rebound quickly, as evidenced by SARS outbreak in 02/03 so prepare for bounce back consumption**



SPENDING HAS SHIFTED AWAY FROM NON-ESSENTIALS BUT BRANDS NEED TO BE PREPARED FOR BOUNCE BACK CONSUMPTION

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Baby Products



During the week of 3/2, total retail traffic fell 9.1% and apparel retail traffic fell 3.9%

As businesses responded to potential increase in acceleration of the spread, several brands (large and small) shuttered brick and mortar stores



As consumers adjust to staying home, many are diverting their discretionary spending for stocking up, temporarily reducing spending on non-essential goods



As social distancing ramps up, visits to newborns, as well as in-person baby showers will become less common



— OUR VIEW ON HOW BRANDS CAN RESPOND

— *swell* SHARK

Fashion & Apparel

- 1. Promote gift-wrapping and gifting kits shipped directly to expecting mothers in lieu of a baby shower**
If delivery or supply chain is strained, consider electronic gift cards to be redeemed at a later date
- 2. Even if sales slow, essentials to prepare for baby's arrival will still be in demand so continue to advertise, while supporting consumers through the current climate on owned channels**
- 3. Lastly, apparel sales rebound quickly, as evidenced by SARS outbreak in 02/03 so prepare for bounce back consumption**



ALTHOUGH MORTGAGE RATES HAVE DROPPED, SOCIAL DISTANCING IS EXPECTED TO DRIVE A DECREASE IN HOME SALES

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Real Estate



Mortgage rates dropped to a record low down to an average of 3.29% the week ending on 3/5, compared to 4% a year ago.

New mortgage applications jumped 25.9% YoY in February



However, with strong social distancing restrictions in effect, limits on house visits frequency and duration have been put in place, with some properties banning them all together, leading some agents to leverage video call for virtual tours



The National Association of Realtors anticipate a 10% reduction of home sales, at least in the short term, as both buyer and seller traffic slow



— OUR VIEW ON HOW BRANDS CAN RESPOND







— *swell* SHARK

Fashion & Apparel

- 1. Think about ways video can be leveraged to allow buyers to view properties, without attending in person**
- 2. Opportunity to promote benefits of interest rate reduction and provide content on how to navigate these uncertain times**
- 3. Lean into social and buyer database to reach customer base**

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Attitudes towards the virus
Purchasing and consumer behavior
Expectations towards brands



CONCERN IS WIDESPREAD BY DEMO

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As of March 12, over 90% of consumers in the U.S. and UK now feel concerned.

But the strength of the concern varies significantly by age:

- 96% of Gen Zs are concerned
- 90% of baby boomers are concerned
- Almost 60% of Gen Zs and millennials are *very or extremely* concerned
- While *only 40% of boomers are very or extremely concerned*

However, as COVID 19 continues to develop, we expect these numbers to shift (upwards)



TELEMEDECINE IS LEADING TO A BROADER CHANGE IN CONSUMER OPENNESS OF VIRTUAL SERVICES



Over 6 in 10 believe telemedicine is effective, and would consider using it

However, 25% of boomers say they are not open to them at all, making them the age group that will need the most convincing and reassurance over their efficacy

In the US, Teladoc daily patient visits have spiked by **50%** and on 3/17, the US government **lifted restrictions on telemedicine** and expanded coverage to all Americans, including under Medicare, which lead to a continued expansion of this service



CONSUMERS ARE ALTERING THEIR DAILY LIVES IN RESPONSE

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As of March 12, Over 80% of people have made at least one change to their day-to-day lives as a direct result of the coronavirus outbreak

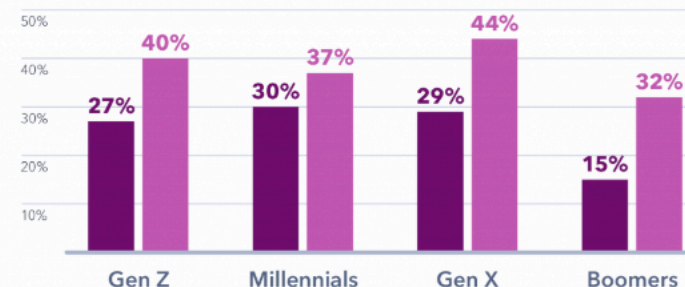
- 60% are washing their hands more frequently the most popular response is to wash hands more frequently (6 in 10), but that's not the only change we're seeing
- 40% are reading the news more frequently
- 20% are altering their daily routines to avoid rush hour and crowded places.



**Increase in news and social media platforms and desktop activity,
but decrease in OOH**

Which of the following changes, if any, have you made as a result of COVID-19/coronavirus?

- Checking social media more often to keep up-to-date
- Reading the news more often to keep up-to-date



Source: GlobalWebIndex March 2020 Base: 2,310 (U.S.) and 2,229 (UK) internet users aged 16-64



— QUARANTINING IS CHANGING THE WAY WE SHOP FOR — *swell*SHARK GROCERIES AND ESSENTIALS



Pantry preparation:

Consumers are prioritizing groceries with a long shelf life. Large sales leaps were observed for powdered milk products (+84%), dried beans (+37%), canned meat (+32%) and rice (+25%).



Online Groceries:

For the first week of March, eMeals shows week-over-week increases as high as **67%** in the number of orders submitted to its grocery partners, including Amazon, Instacart, Kroger, Shipt and Walmart.

As of 3/17, Amazon is halting the processing of non-essential goods until April 5 to prioritize increased demand for products and shortages of essential items like groceries, cleaning supplies, medical supplies.

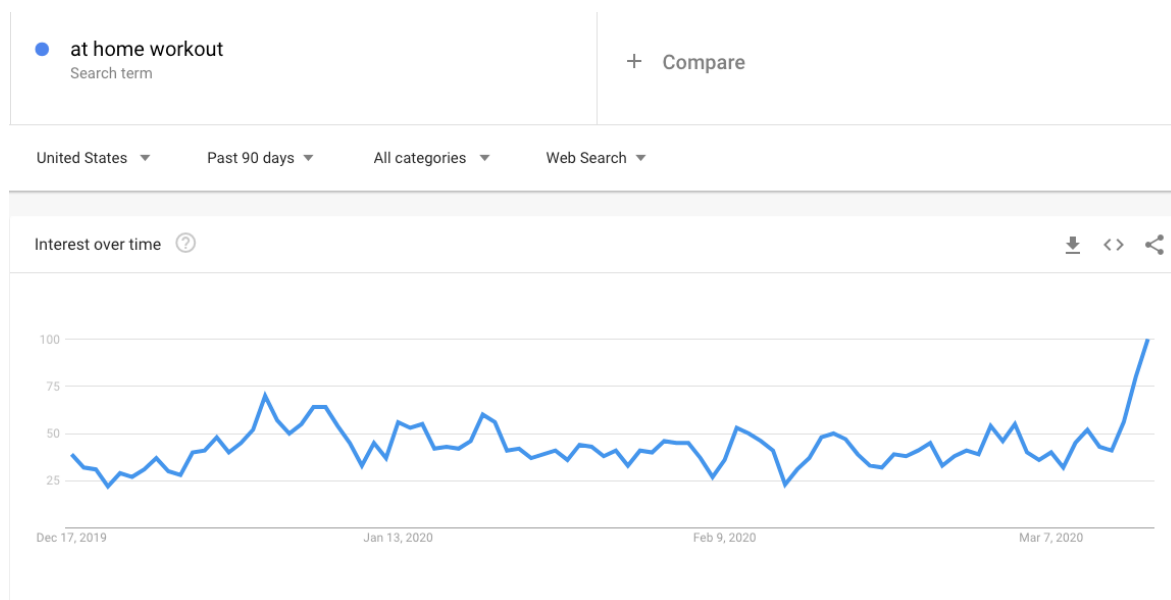


This shift is positively impacting long shelf CPG brands with increased demand but in the short term will negatively impact brands of non-essential products that rely heavily on Amazon as a sales channel



SEARCHES HAVE SPIKED FOR AT HOME WORKOUT CONTENT, AS FITNESS COMPANIES ADAPT TO SERVE THIS NEW NEED

— *swell*SHARK



Related queries ?

Rising ▼

1	at home bodyweight workout	+110%
2	at home glute workout	+90%
3	30 minute at home workout	+80%
4	at home core workout	+80%
5	workout videos at home	+70%



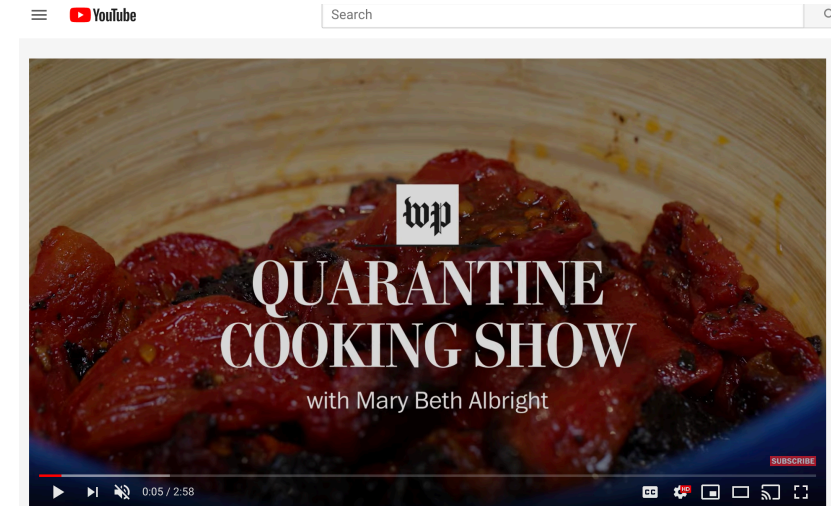
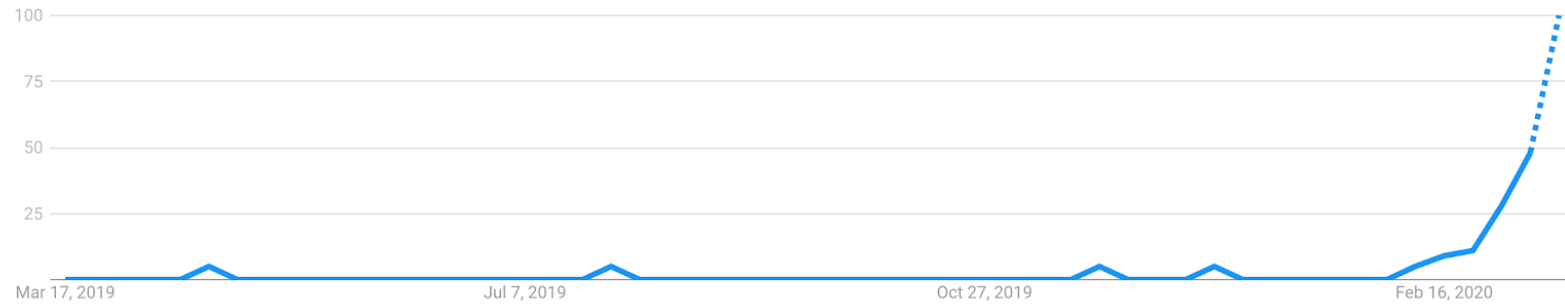
Competition will increase across paid search, display and social for any service or product focused on at-home solutions



— AND QUARANTINE COOKING IS A NEW TREND

— *swell*SHARK

Interest over time ?



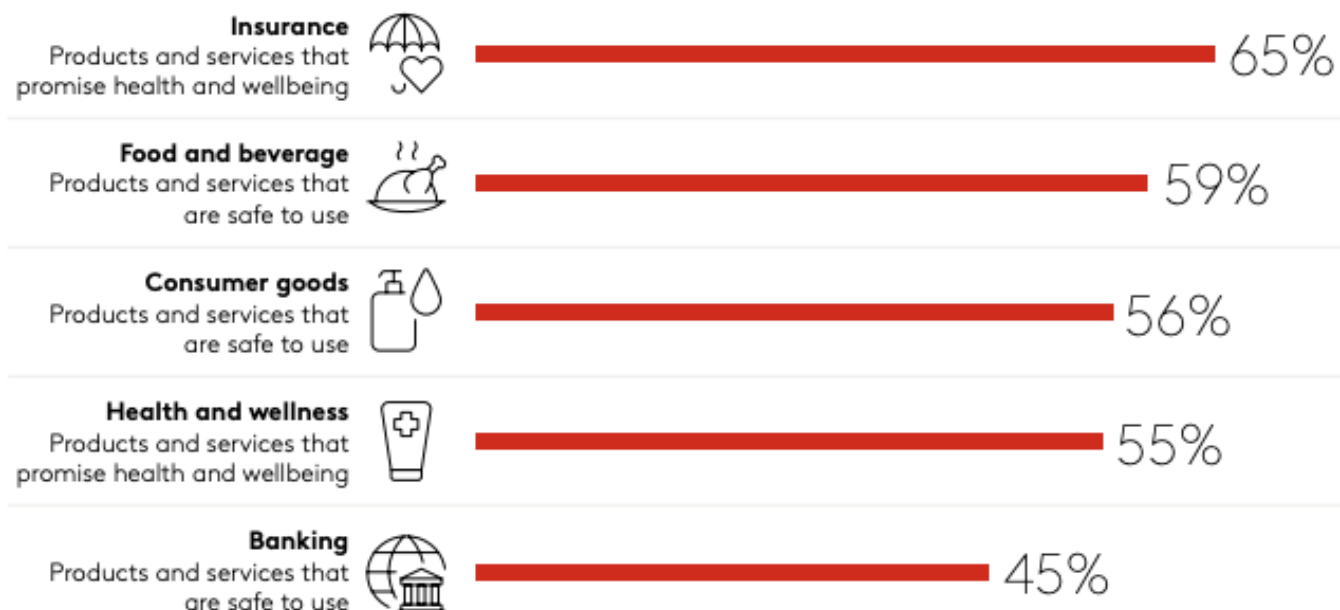
In China, closures sparked a quarantine cooking trend, as minimal ingredients forced people to get creative with recipes. This trend has continued across Europe and North America, inspiring people to cook at home with what they have on hand



CONSUMER EXPECTATIONS FROM BRANDS HAS ONLY INCREASED SINCE THE OUTBREAK

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Consumer expectations from brands across categories



People are looking to trusted brands to provide them with safety and security in testing times

They want to be assured that the brands they choose are in control of their supply chains, transparent and trustworthy

People expect brands to deliver real value, act responsibly and do right by the community, including their employees

Brands who are able to deliver purpose in an ethical way will see their value grow much more



BRANDS WILL BE REWARDED FOR OFFERING CONSUMER UTILITY IN THEIR DISRUPTED LIVES

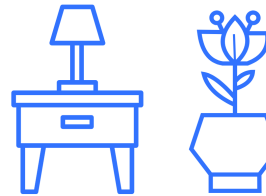
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Home-cooking



Fitness



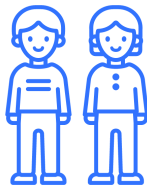
Working at home



Wellness and
mediation



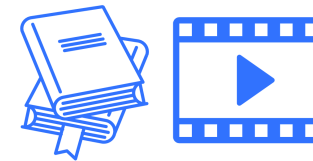
Finances



Activities
for kids



Arts and
Crafts



Entertainment



EARLY SIGNS OF LONG-TERM SHIFTS IN CONSUMPTION HABITS

It is too early to say which new habits and behaviors will have long-term impacts but based on current trends and what was observed in China, we expect the below will become important areas to watch moving forward

Leap from offline to online education

Transformation in service delivery from IRL to virtual

Accelerated digital transformation efforts for businesses

Continued growth of e-commerce, attracting older generations

COVID-19 LANDSCAPE OVERVIEW

swellSHARK

- 1  POLICY RESPONSE
- 2  COMMERCIAL IMPACT
- 3  SHIFTS IN CONSUMER BEHAVIOR
- 4  **SHIFT IN MEDIA CONSUMPTION**
- 5  HOW BRANDS ARE RESPONDING
- 6  INSPIRATION & RESILIENCE

Lessons from China
Offline Media
Online Media



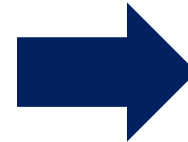
IN CHINA, THERE WAS A 20% INCREASE IN ONLINE ACTIVITY

swellSHARK

20% SPIKE IN ONLINE ACTIVITY, WHICH RESULTED IN A SHIFT IN MARKETING EFFORTS TO ONLINE

The L'Oréal Group reported successful sales in February because it ended offline advertising and shifted online.

LVMH launched an online pop-up store within WeChat with live chat for pre-sale consultations and promotions shared via store associates online -- online sales increased 2x from 2019



**Focus on media that is easily
accessible at home, like radio,
video and social.**



IN CHINA, THERE WAS A 20% INCREASE IN ONLINE ACTIVITY

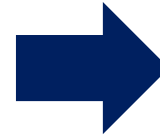
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AN INCREASE ONLINE VIDEO USAGE

People isolating themselves at home were hungry for entertainment and information.

Activewear brands were quick to promote in-home exercise content at a time when usage of the short video app Douyin (known as TikTok in the West) had seen usage as much as double.

Nike began posting workouts to the platform, and its account has amassed 346,000 followers and more than 2 million likes.



Find ways to insert your brands voice to demonstrate you understand the impact this is having on consumers and how you are willing to help adapt to help them.



SO FAR, TV RATINGS ARE ALREADY UP ACROSS ALL KEY DAYPARTS

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Viewing levels are up across ALL key dayparts (A25-54)

In addition, WNBC's Ratings are UP Across Nearly All Dayparts (A25-54):

	3/11-3/16 vs 3/2-3/10 % Diff
Daypart	PUT - A25-54
M-F 4A-7A (Loc)	4%
M-F 5A-7A (Loc)	0%
M-F 7A-9A (Loc)	4%
M-F 9A-12P (Loc)	19%
M-F 12P-3P (Loc)	19%
M-F 3P-4P (Loc)	29%
M-F 4P-7P (Loc)	18%
M-F 5P-630P (Loc)	18%
M-F 7P-8P (Loc)	4%
M-Su 8P-11P (Loc)	5%
M-Su 11P-1130P (Loc)	11%
M-Su 1130P-130A (Loc)	10%

					3/11-3/16 vs 3/2-3/10 % Diff	Date Ranges: 03/11/2020- 03/16/2020			Date Ranges: 03/02/2020- 03/10/2020		
					P25-54	P25-54			P25-54		
Market	Daypart	Net	Stn	Rtg	PUT	Rtg	Imps	PUT	Rtg	Imps	PUT
NEW YORK	M-F 4A-7A (Loc)	NBC	WNBC	19%	4%	0.57	40.3	7.41	0.48	33.8	7.13
NEW YORK	M-F 5A-7A (Loc)	NBC	WNBC	10%	0%	0.68	47.6	8.00	0.62	43.9	8.00
NEW YORK	M-F 7A-9A (Loc)	NBC	WNBC	1%	4%	1.05	74.0	12.4	1.04	73.6	11.9
NEW YORK	M-F 9A-12P (Loc)	NBC	WNBC	30%	19%	0.60	42.4	13.6	0.46	32.7	11.4
NEW YORK	M-F 12P-3P (Loc)	NBC	WNBC	13%	19%	0.35	24.9	14.6	0.31	22.2	12.2
NEW YORK	M-F 3P-4P (Loc)	NBC	WNBC	49%	29%	0.82	57.8	16.80	0.55	38.7	13
NEW YORK	M-F 4P-7P (Loc)	NBC	WNBC	42%	18%	1.18	82.8	21.9	0.83	58.3	18.6
NEW YORK	M-F 5P-630P (Loc)	NBC	WNBC	40%	18%	1.16	81.9	22.4	0.83	58.6	19
NEW YORK	M-F 7P-8P (Loc)	NBC	WNBC	19%	4%	1.12	79.1	29	0.94	66.6	27.8
NEW YORK	M-Su 8P-11P (Loc)	NBC	WNBC	-16%	5%	1.05	74.2	33.5	1.25	88.2	31.9
NEW YORK	M-Su 11P-1130P (Loc)	NBC	WNBC	20%	11%	1.28	90.4	27.8	1.07	75.6	25.1
NEW YORK	M-Su 1130P-130A (Loc)	NBC	WNBC	4%	10%	0.70	49.6	17.8	0.67	47.5	16.1

Comparing the past 6 days (3/11-3/16) versus prior 9 days (3/2-3/10) against HH & A25-54 (ratings, impressions, PUT levels) for each of the 6-major NY stations.

→ key selling dayparts — Early Morning News, Network news, daytime AM, daytime PM, Early Fringe, Early News, Prime Access, Prime, Late Fringe

*NBC Owned Stations across the country are adding new 7 p.m. and 11:30 p.m. newscasts to keep viewers informed about the latest coronavirus pandemic developments in their communities.



ACROSS THE TOP 25 MARKETS, OVERALL VIEWERSHIP IS UP 11%

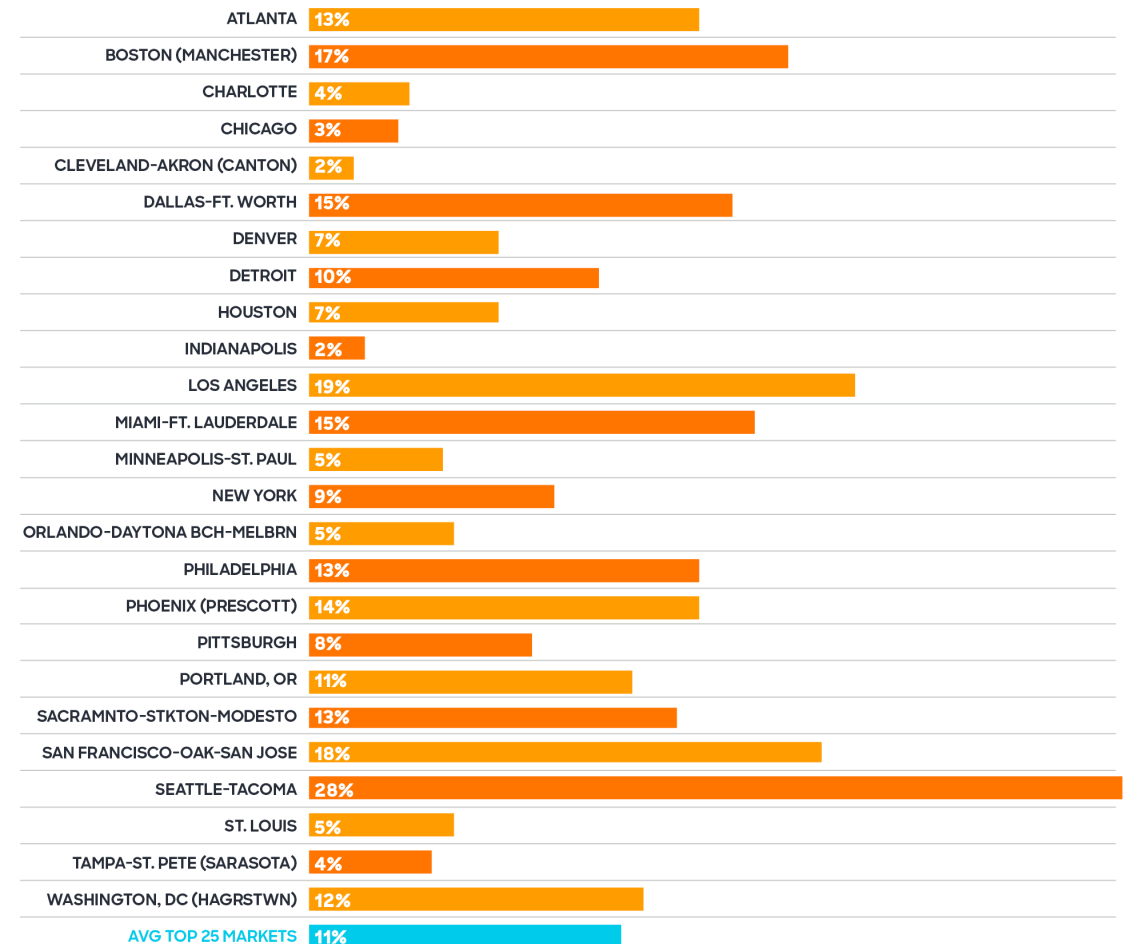
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The biggest increase (28%) came in the [Seattle-Tacoma](#) market where many early cases of the virus were reported.

Other markets showing big gain included Los Angeles, up 19%; San Francisco/Oakland, up 18%; Miami, up 15% and Phoenix, up 14%. New York local news viewing rose 9%.

Local Newscasts: Average Household Viewership in Top 25 Markets

PERCENT CHANGE - WEEK OF MARCH 9 VS. WEEK OF FEB. 10



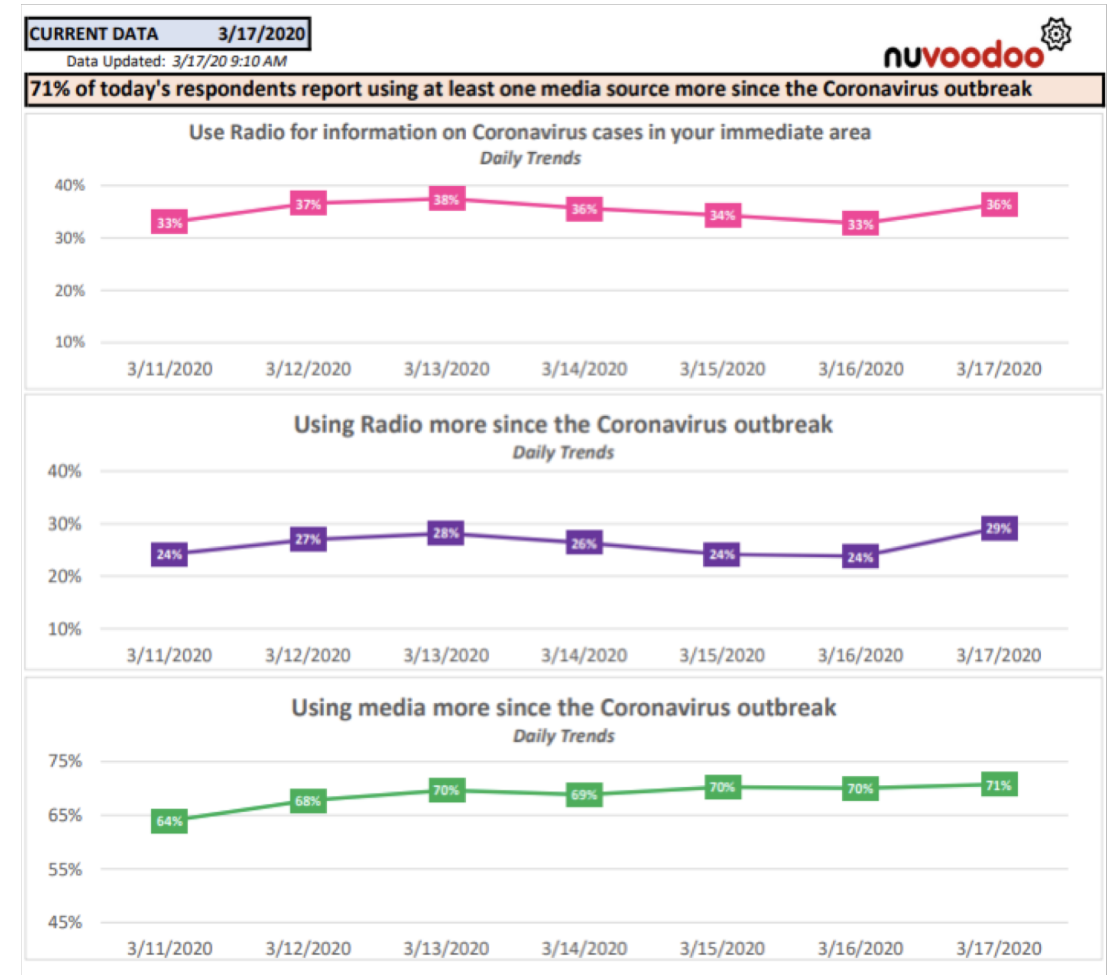


RADIO LISTENERSHIP HAS INCREASED BY 29%

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Radio is trending up, as 29% of users report using it more since the outbreak, and 36% are using it to keep informed about local cases:

- Of those who are regular remote workers, Nielsen Scarborough USA+ reports that 90.8% of Americans who work from home are reached by AM/FM broadcast radio.
- Katz Digital's broadcast streams are up 48% vs. last year
- The largest share of smart speaker listening is to AM/FM Radio – currently double that of Pandora, and 60% more than Amazon Music
- From Feb 24th to Mar 16th, general audio listening hours up 16% across DAX network. Smart speaker listening hours have jumped 27%.



source: <http://data.nuvoodoo.com/covid19/NuVoodoo-Covid19-latest.pdf?1584455265>

Source: from Katz Radio (rep firm for almost all terrestrial radio stations)

Sources: Jacobs Techsurvey 2019; Bureau of Labor Statistics; Scarborough 2019-2; Share of Ear 2019, courtesy of Cumulus/Westwood One; GfK MRI 2019 Doublebase

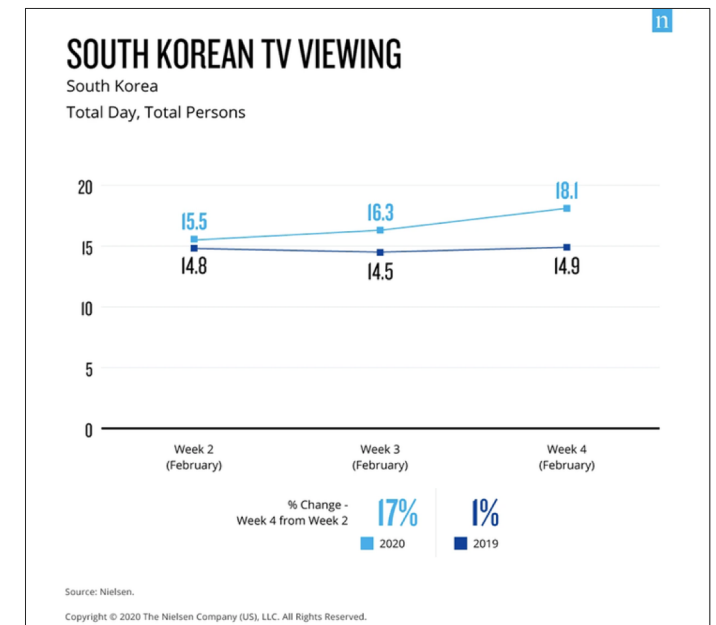
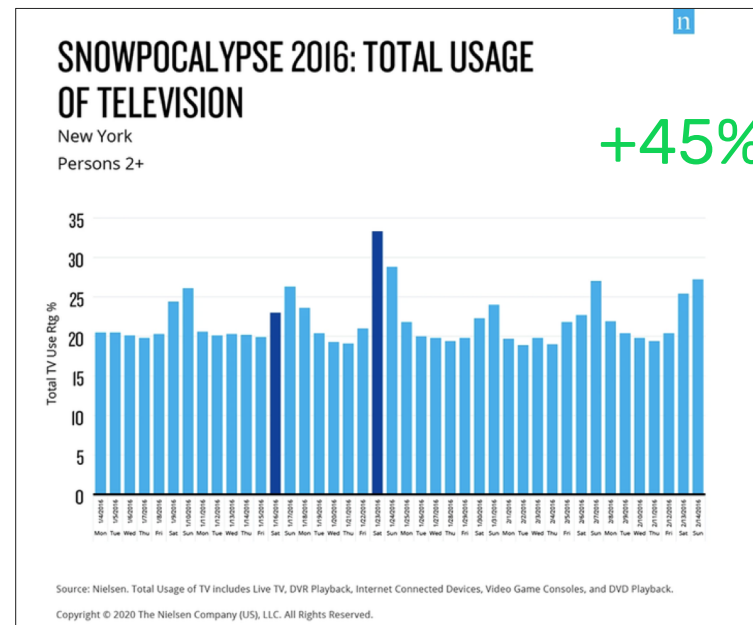
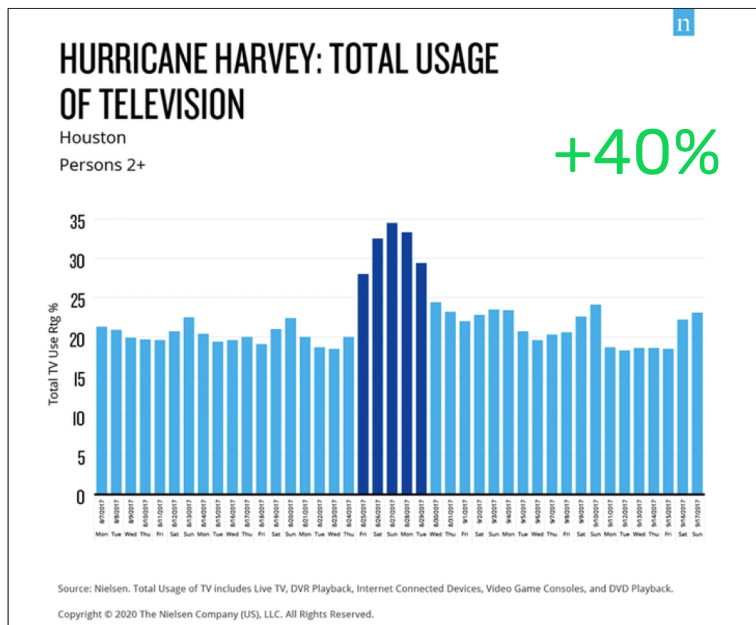


STREAMING VIDEO COULD RISE BY OVER 60%

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Consumers watched **61% more streaming on television** – during two previous crises that kept people housebound, just like coronavirus fears are doing now, according to a new study by Nielsen.

→ Americans were already spending just shy of 12 hours each day with media platforms and 3/4 of U.S. consumers have streaming subscriptions and TV-connected devices

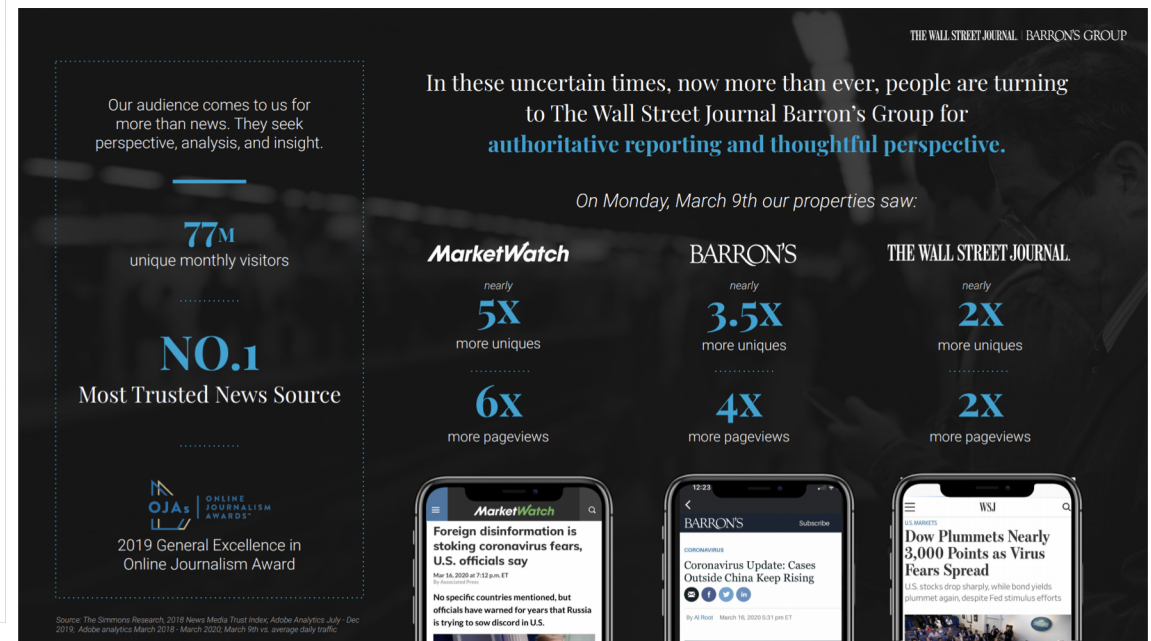




SITE TRAFFIC TO NEWS PUBLICATIONS HAS INCREASED YOY BY OVER 50%

swellSHARK

Date	FY20	FY19	% Change
2020-03-09	9.6M	5.3M	79%
2020-03-10	9.2M	5.7M	60%
2020-03-11	9.5M	6.2M	53%
2020-03-12	10.3M	5.8M	77%
2020-03-13	8.9M	5.9M	52%
2020-03-14	6.0M	3.3M	81%
2020-03-15	6.2M	3.1M	98%
2020-03-16	9.5M	6.1M	57%



A portion of increased WSJ traffic can be attributed to them making sure that even non-subscribers can read the COVID-19 content by removing the paywall around those articles.



WITH CONSUMERS AVOIDING PUBLIC PLACES OOH CONSUMPTION WILL DECLINE

swellSHARK

Out-of-home (OOH) ad spending could see a negative impact due to social distancing and isolation measures. Consumers in countries with significant numbers of coronavirus cases are already avoiding large public places and gatherings, and that may eventually impact advertisers' willingness to advertise in public spaces as well.

Nearly half (47.2%) of US internet users polled by Coresight Research last month said they are currently avoiding shopping centers and malls. If the outbreak worsens, roughly three-quarters (74.6%) said they will steer away from shopping centers altogether.

US Internet Users Who Are Currently Avoiding vs. Will Avoid Public Places/Travel if the Coronavirus Outbreak Worsens in the US, Feb 2020

% of respondents

	Currently avoiding	Will avoid
Public transportation	49.3%	73.1%
International travel (e.g., vacations, business trips)	47.4%	68.2%
Shopping centers/malls	47.2%	74.6%
Movie theaters	41.9%	66.6%
Medical centers/hospitals	38.9%	50.6%
Community centers	35.5%	56.9%
Restaurants/bars/coffee shops	35.3%	60.5%
Shops in general	32.7%	52.7%
Sports events	32.0%	58.8%
Other entertainment/leisure venues	21.6%	40.7%
Schools/colleges	21.1%	39.3%
My workplace	11.1%	17.0%
Other	2.4%	1.4%

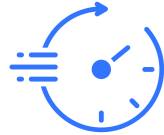
Note: currently avoiding n=532; likely to avoid n=1,121; ages 18+
Source: Coresight Research, "Coronavirus Briefing: Flash Report," Feb 28, 2020

253461

www.eMarketer.com



SOCIAL ACTIVITY HAS SPIKED



Twitter has seen that [COVID-19 related content is shared every 45 milliseconds](#) and [#coronavirus](#) is now the second most used hashtag of 2020.



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In times of crises, people want credible information. We've seen that verified people on Twitter are about [2.4X](#) more likely to participate in COVID-19 conversation than non-verified people, and [75% of COVID-19 related Tweets are actually Retweets](#). In other words, the primary method of sharing information during a time of crisis is through Retweeting.





AND REDDIT ESPECIALLY HAS SEEN AN EXPONENTIAL GROWTH

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The Reddit mobile app is “growing faster than all other platforms and at the fastest rate we have seen in a couple years,”.

→ **20% year-to-date increase** in Reddit’s chat platform.

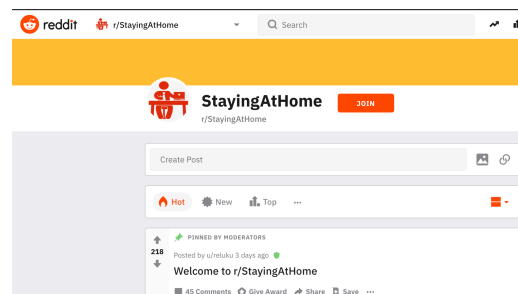
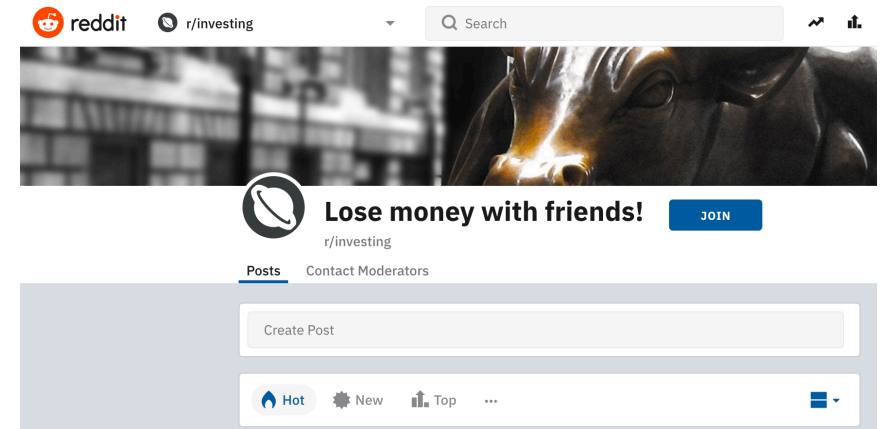
In February, Reddit garnered

- 85.4 million uniques in the U.S.
- 430 million monthly active users worldwide.



Traffic increases of **20-50% in subreddits** related to business, finance, news, education, travel and sports over the past week:

r/investing and r/wallstreetbets → **9x** increase in views



On Tuesday, r/coronavirus **ranked second** with 1.2 million members.

Reddit users created **r/stayingathome on March 15** dedicated to learning new skills and managing work from home and life in self-isolation, and it is already **among the top five fastest-growing subreddits**.



CONSUMERS ARE SEARCHING FOR ANSWERS

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They're searching for solutions.

They want ideas for upended travel plans, kids stuck at home, working—and working out—from home, and so much more. Searches like “how to entertain bored kids” and educational activities related to germs are rising.



They're seeking positivity.

The constant stream of news online can get overwhelming. More than ever, people need a positive corner on the internet. Searches for “keeping calm” and “staying calm” increased 31% in the last two weeks vs. the two weeks prior. And people are keeping their spirits up with searches like “quarantine funny” rising, too.



They're searching for answers.

There's been a huge spike in searches on cancellations, “NBA season cancellation” +2,700%, “elective surgery cancellation” +2,600%, sat test cancellation and the list goes on.

We need to ask how our consumers are being impacted by COVID-19 and how our brand can combat these changes to provide support and solutions.



STAY AGILE WITH TARGETING TO MAINTAIN RELEVANCY ACROSS AUDIENCES

*swell*SHARK



We are seeing a decrease in engagement and delivery against in-market audiences

→ Volume down 75%



But are seeing an increase in engagement and delivery against interest-based audiences

→ Volume up 500%




THE MYER'S REPORT IS PREDICTING SIMILAR MEDIA CONSUMPTION TRENDS

swellSHARK



The report predicts an increase in Broadcast Network TV, Social Media, PR, Videogame Advertising, Content Marketing and VOD/Addressable TV

<div> Comparison of Pre-Coronavirus and Post-Coronavirus The Myers Report 2020 Data and Forecast</div>	% Change		\$ Change		%Loss(Gain)
	2020 Pre	2020 Post	2020 Pre	2020 Post	Post\$ compares to Pre\$
Direct-to-Trade Promotion/Slotting Allowances**	-3.0%	-3.0%	130,403	128,941	-1.1%
Shopper Marketing (FSI's, Consumer Promotion, Co-op, OTT TV)**	-2.3%	-4.0%	79,947	78,595	-1.7%
Direct Mail/ E-Mail Marketing**	-7.0%	-13.8%	28,847	26,725	-7.4%
Search Marketing (Online & Mobile)**	6.0%	4.0%	57,133	56,055	-1.9%
Cable/Satellite Network Television	-3.3%	-6.0%	27,792	27,006	-2.8%
Local & National Spot Broadcast TV	10.0%	7.4%	25,114	24,523	-2.4%
Experiential/Event Marketing (excluding digital)**	-2.4%	-11.8%	22,462	20,299	-9.6%
Print-Originated Newspaper Advertising	-4.6%	0.8%	14,953	15,809	5.7%
Mobile & Apps Advertising (excluding Mobile Search)	18.0%	11.0%	51,633	48,570	-5.9%
Broadcast Network TV	-1.8%	2.2%	19,709	20,513	4.1%
Audio	6.3%	5.9%	19,921	19,850	-0.4%
Consumer Print-Originated Magazine Advertising	-3.4%	-2.8%	12,602	12,682	0.6%
Social Marketing (digital)**	11.1%	12.1%	30,514	30,789	0.9%
Out-of-Home	2.8%	1.3%	9,058	8,928	-1.4%
Branded Entertainment/Product Placement**	1.5%	-1.4%	9,155	8,893	-2.9%
Online-Originated Display (Banner) Advertising	-11.2%	-11.2%	4,557	4,557	0.0%
Yellow Pages **	-3.2%	-3.2%	4,587	4,587	0.0%
Local/Regional Cable TV	4.5%	4.5%	5,235	5,235	0.0%
Business-to-Business Media**	-7.5%	-8.7%	4,390	4,330	-1.4%
Online Originated Video Advertising	19.8%	19.8%	20,742	20,742	0.0%
Public Relations (offline)**	-8.0%	-2.0%	2,330	2,482	6.5%
Broadcast Syndication	-0.6%	-0.6%	2,509	2,509	0.0%
Videogame Advertising/Virtual Gaming Currency	5.5%	6.8%	2,190	2,217	1.2%
Content Marketing/Site Development**	4.3%	11.3%	2,684	2,863	6.7%
Digital Place-Based Video Media (excl. cinema)	3.2%	0.0%	1,377	1,334	-3.1%
Cinema Advertising	0.6%	-6.6%	805	747	-7.2%
Interactive, VOD & Addressable TV Advertising***	38.0%	42.0%	2,536	2,610	2.9%
Hispanic Media	3.2%	3.2%	7,035	7,035	0.0%
TOTAL	1.8%	-0.1%	600,220	589,423	-1.8%

COVID-19 LANDSCAPE OVERVIEW

swellSHARK

- 1  POLICY RESPONSE
- 2  COMMERCIAL IMPACT
- 3  SHIFTS IN CONSUMER BEHAVIOR
- 4  SHIFT IN MEDIA CONSUMPTION
- 5  **HOW BRANDS ARE RESPONDING**
- 6  INSPIRATION & RESILIENCE

Lessons from past crises
Initial responses from brands



HOW BRANDS HAVE RESPONDED IN THE PAST DURING SIMILAR CIRCUMSTANCES

swellSHARK



TECHNOLOGY

How

The tech company continued to innovate with new products during the slumping economy, most notably with new Kindle products which helped to grow market share. In a first, on Christmas Day 2009, Amazon customers bought more e-books than printed books.

Results

Amazon sales grew by 28% in 2009 during the “great recession.”



Imported Automobiles

How

The 17-month recession of 1973–75 was triggered by the energy crisis. In late 1973, the U.S. government issued its first miles-per-gallon report in which Toyota Corolla was second to Honda Civic in fuel efficiency. Since Toyota was experiencing strong sales, when the economic downturn hit, the temptation was to drop their ad budget, which they resisted.

Results

By adhering to its long-term strategy, Toyota surpassed Volkswagen as the top imported carmaker in the U.S. by 1976.



Quick Service Restaurants:

How

In the 1990–91 recession, Pizza Hut and Taco Bell took advantage of McDonald’s decision to drop its advertising and promotion budget.

Results

As a result, Pizza Hut increased sales by 61%, Taco Bell sales grew by 40% and McDonald’s sales declined by 28%.



AUTO COMPANIES ARE PULLING NATIONAL ADS AND REPLACING THEM WITH CORONAVIRUS- RESPONSE CAMPAIGN

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Ford introduced a new campaign describing how it is responding to the coronavirus, including giving Ford Credit customers some payment relief on their auto loans

Here are links to the two new spots, ["Built to Lend a Hand"](#) and ["Built for Right Now"](#)

Existing Ford Credit customers in the U.S. affected by COVID-19 who purchased or are leasing vehicles are being encouraged to contact Ford Credit to discuss options if they're having difficulty making payments. For example, they may be able to change a payment due date or delay a payment. The ad campaign is designed to build awareness for the new program.

In addition, Ford's philanthropic arm, the Ford Motor Company Fund, is providing assistance to nonprofit organizations meeting critical community needs.





BRANDS SHOW EMPATHY BY SHIFTING EFFORTS TO PROVIDE RESOURCES DURING MASS CLOSURES

*swell*SHARK



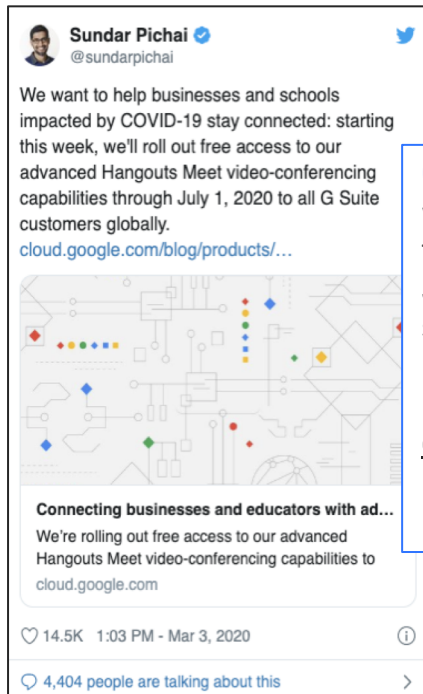
City guide Time Out re-brands to provide resources and support to people stuck indoors

The publication has also launched the "Love Local" campaign to support independent venues which will arguably be hit the hardest by this pandemic.



TECH COMPANIES ARE GIVING BACK THROUGH FREE AD SPACE AND SUBSCRIPTION EXTENSIONS & FIGHTING MISINFORMATION

swellSHARK



Google announced on Wednesday that it will give all G Suite customers free access to advanced Hangouts features through July 1st, while Microsoft is offering a free six-month trial for its premium tier of Microsoft Teams.

Facebook is one of multiple tech companies extending free services in response to the virus.

We are working closely together on COVID-19 response efforts. We're helping millions of people stay connected while also jointly combating fraud and misinformation about the virus, elevating authoritative content on our platforms, and sharing critical updates in coordination with government healthcare agencies around the world. We invite other companies to join us as we work to keep our communities healthy and safe.

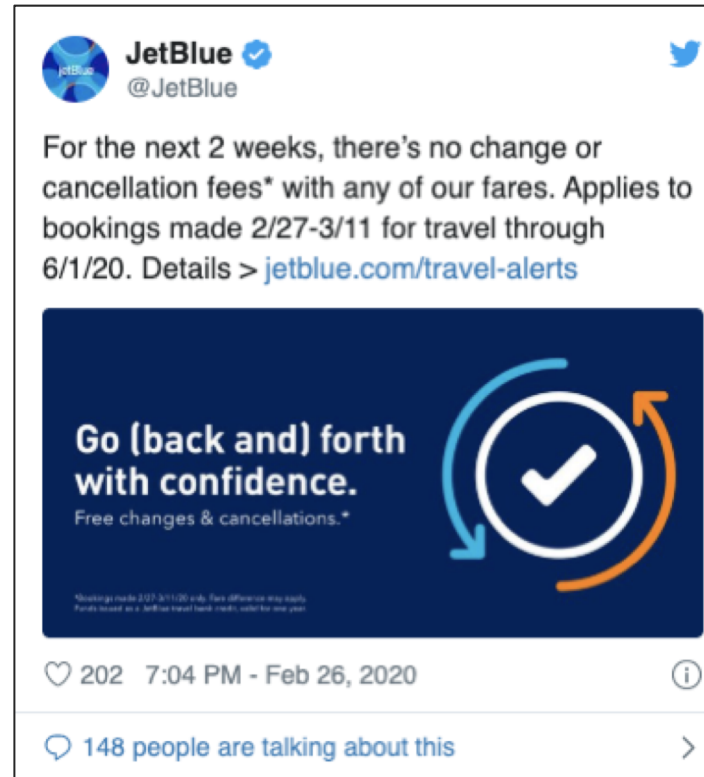
Social platforms are working to fight misinformation and fraud across their platforms.

FACEBOOK Google LinkedIn Microsoft reddit Twitter YouTube

Joint Industry Statement from Facebook, Google, LinkedIn, Microsoft, Reddit, Twitter and YouTube

AIRLINES ARE WAIVING CANCELLATION FEES

swellSHARK



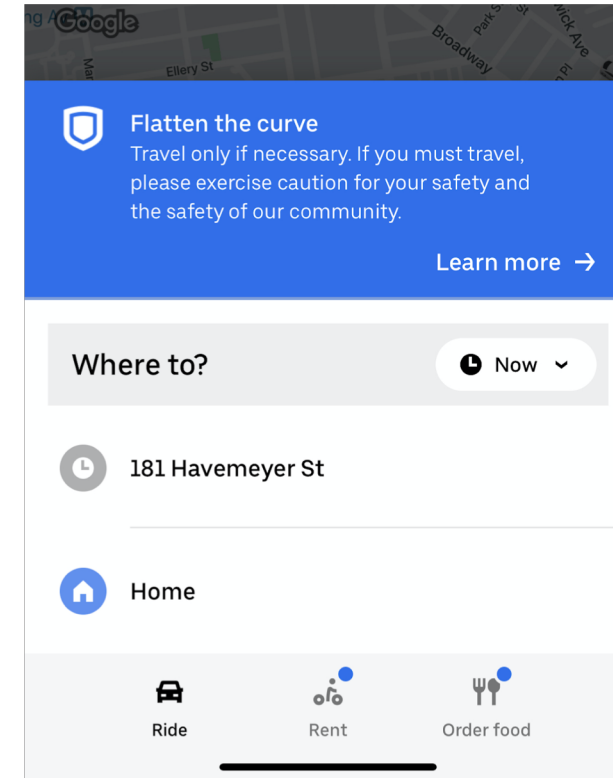


UBER, VIA & LYFT CHANGE RIDESHARE OPTIONS

swellSHARK

Both companies have removed the pool/share options to flatten the curve in the US and Canada.

Uber has added a persistent message in its app as well and is offering financial assistance to drivers infected by the virus or put under quarantine



Add via



COMPANIES ARE REPURPOSING CAPABILITIES TO BOLSTER NECESSARY SUPPLIES

swellSHARK

LVMH converting their perfume production facilities to produce hand sanitizer to be distributed for free to French health authorities amid the coronavirus pandemic.



The Hollywood Reporter @THR · Mar 16

The parent company of Givenchy, Louis Vuitton and Dior began making hand sanitizer instead of luxury fragrances on Monday



Givenchy, Dior Perfumeries Now Manufacturing Hand Sanitizer
Parent company LVMH will donate the in-demand products to French hospitals.

hollywoodreporter.com

311

7.9K

17.4K





OTHER RETAIL BRANDS ARE ALSO CLOSING TO STOP THE SPREAD, AND SUPPORTING EMPLOYEES HOWEVER THEY CAN...

swellSHARK

Brands are supporting their communities by closing stores, and continuing to pay staff

Nothing matters more than the relationships we've built over the past 35 years.

To protect your well-being and that of our employees, we are temporarily closing all of our stores for two weeks, beginning Sunday, March 15 through Friday, March 27. We will continue to pay our staff during this time. We are determined to do all we can to help control the spread of the novel coronavirus (COVID-19) and ensure our community recovers as soon as possible.

In this unprecedented time, the most important thing we can do is choose to take care of one another.

As always, we are ready to help you find the pieces you love online at eileenfisher.com.

Please stay in good health,
The EILEEN FISHER Team

EILEEN FISHER
Yesterday · 🌐

Starting today, we are temporarily closing our stores for two weeks. As conditions continue to evolve, we will monitor the advice given by expert agencies like the Centers for Disease Control and the World Health Organization to determine when it's safe to reopen. Please continue to be smart, be kind, and be safe.

👍❤️ 818 79 comments 98 shares

👍 Like 💬 Comment ➦ Share

Most relevant ▾

👤 Top fan
Alexandra Avripas Thank you Eileen Fisher for being so conscientious for the well being of your staff and customers. Your principles, kindness and integrity are a true example of leadership. ❤️
Like · Reply · 9h · Edited

👤 Top fan
Annette Nading Thank you Eileen for keeping our sweet friends at the Cherry Creek store in Denver safe!
Write a comment... 🗨️ 📧 📷

AWAY

The worldwide COVID-19 pandemic is forcing everyone to rethink how they interact with the world—our work habits, how we gather, and how we travel. As a company who cares deeply about our community and employees, we've been carefully considering everything we can do to help the situation.

So much is unknown right now, but the one thing we do know that can help mitigate the spread of COVID-19 and protect ourselves and our community is to take steps to limit our exposure to others. This is why we have made the decision to temporarily close our retail locations, as well as our location where monogramming services are performed, for at least two weeks starting close of business Monday, March 16. We will also delay the upcoming opening of our store in Dallas. All Away employees and store team members will receive pay during this period, and we will reassess things as events warrant. In our corporate offices, we will continue to encourage remote work arrangements.

Travel is at the heart of what we do at Away, because it brings us all together. In this uncertain time, we urge our community to continue to act with compassion and care as we consider how we move about the world, and take all necessary precautions to protect yourselves and each other.

—The Away Team

While smaller businesses, such as Nitehawk Cinema/Restaurant are giving food that can no longer be sold to employees to (try) ease some strain while they are off work

NEW YORK
A Movie Theater Family Says a Tearful Goodbye
By Todd Heiser
March 17, 2020

See you on the other side.

Those were the words that Matthew Viragh was trying to spell on the marquee at the Nitehawk Prospect Park movie theater in Brooklyn on Saturday afternoon. It was a simple message, but it was taking longer than usual because every couple of minutes one of the theater's employees stopped him to say, goodbye — for now.

A few days earlier, Gov. Andrew M. Cuomo had announced restrictions on large public gatherings. And then on Monday, New York, along with New Jersey and Connecticut, ordered movie theaters and most other "nonessential" businesses to close down at 8 p.m., sending yet another coronavirus-related ripple through the local economy.



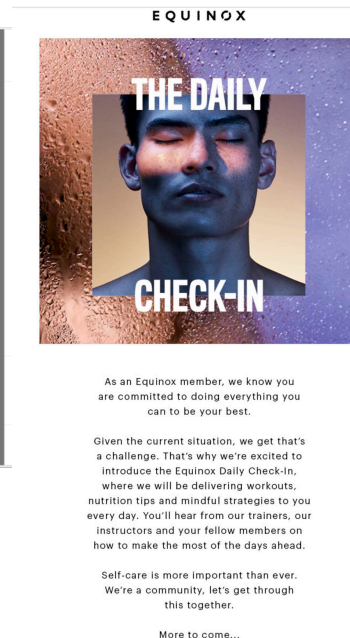
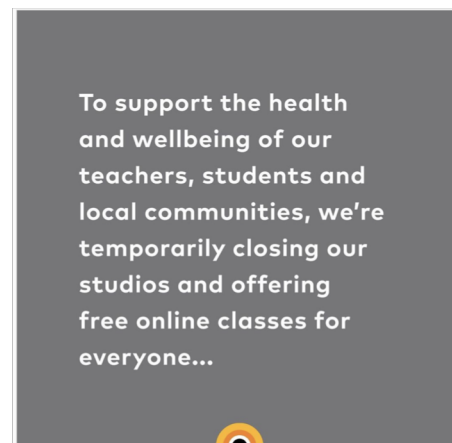
TRADITIONALLY "OFFLINE" BUSINESSES ARE CREATING ONLINE SPACES TO SUPPORT THEIR AUDIENCE AND PROVIDE CONTINUITY

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Met Opera streams for free during Corona Virus Closure:



Exercise class providers are providing free online classes (rather than in-person attendance at brick and mortar location) as well as health and nutrition tips



Teachers leveraging platforms such as audio books to continue in-class study (and being supported by authors)

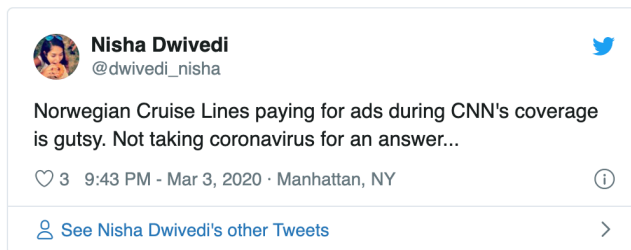




BRANDS HAVE RECEIVED BACKLASH

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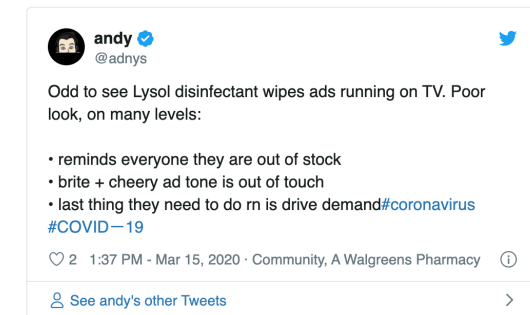
Norwegian Cruise continued to advertise after cruise ships started to get quarantined.



Geico had to pull their high five commercial after people started to practice social distancing.



Disinfectant products didn't respond quick enough when shortages of their products began to occur.



Ensure your brand is being sensitive and acknowledge what is happening. Keep up to date on what key things might impact your consumers. For example, the shortage of disinfectant products, outbreaks occurring on cruise ships and people no longer being able to high-five or shake hands.



HUMANIZE YOUR BRAND BY SHOWING YOU CARE AND UNDERSTAND WHAT IS HAPPENING IN THE WORLD

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GIVING BACK

Google, Microsoft and Facebook extending free access to their services



DEMONSTRATING AN UNDERSTANDING

Airlines waiving cancellation fees



FINDING A VOICE

Time Out creating the "Love Local" and switching their name to Time In



ADAPTING YOUR NORMAL

LVMH converting their perfume production facilities to produce hand sanitizer

COVID-19 LANDSCAPE OVERVIEW

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- 1  POLICY RESPONSE
- 2  COMMERCIAL IMPACT
- 3  SHIFTS IN CONSUMER BEHAVIOR
- 4  SHIFT IN MEDIA CONSUMPTION
- 5  HOW BRANDS ARE RESPONDING
- 6  **INSPIRATION & RESILIENCE**

Some uplifting stories and reactions around the world

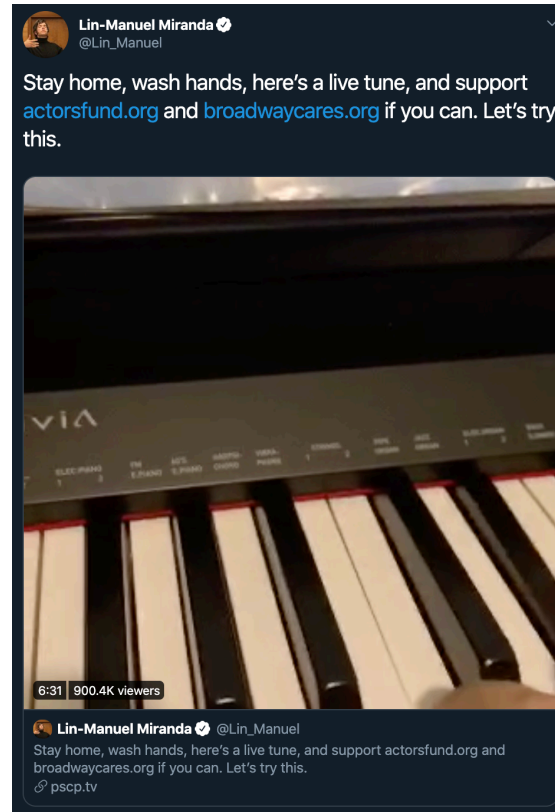


CELEBRITIES ARE USING THEIR VOICE TO SUPPORT THE COMMUNITY

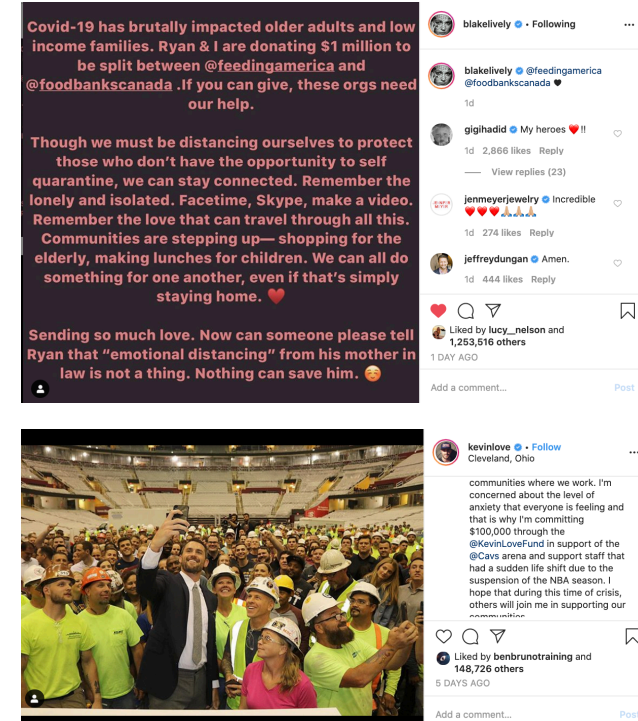
Broadway star, Laura Benanti, telling students she'll be their audience and asking them to share their cancelled school performances



Lin Manuel Miranda performing live to raise funds for Broadway actors



Celebrities have donated to not-for-profits like feeding America or all affected by the closure of sports arenas





WHILE EVERYDAY PEOPLE ARE GETTING CREATIVE TO PASS TIME, MAKING OTHERS FEEL SPECIAL AND MAKE THE BEST OF THE SITUATION

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Window Tennis



Sock Pac-Man

