

A field of purple crocus flowers in bloom, with a central graphic of concentric circles and the year 2020.

2020

CHINA SPRINGS BACK FROM COVID-19

RE-FRAMING 2020 AND LESSONS FROM CHINA'S RECOVERY

At the turn of every year, Totem puts together its trends for the year ahead. We survey brands, interview experts and collect stories and case studies which illustrate the most prominent emerging issues.

Covid-19 hit just after we completed our report for 2020. Most of the trends we projected for 2020 are accurate but our brand budgeting projections ended up being way off target. The surveys we did with brands at end of 2019 about plans for 2020, were thrown out the window when Covid-19 derailed China's economy in Q1.

So, with this short report, we wanted to go back to the surveyed brands, to get revised budget insights for 2020. We also wanted to assess; (1) how these brands fared during the depths of the outbreak in China, and (2) how they are managing the current recovery underway in China.

There are strong signs to indicate that China's economy is recovering and business is starting to get back on track. Budgets are trending much lower than original projections but many brands are starting to spend again - as consumers are spending. And despite the fact that offline (retail and ads) were crushed during the crisis, brands that were digitally capable fared reasonably well.

There are a few insights from this updated analysis:

1. China might just be the best chance global brands have for any growth in 2020
2. The crisis has accelerated many structural changes that were already underway
3. Online marketing and sales proved to be resilient through the crisis
4. Brands that want thrive post-recovery need to quickly connect with customers to understand their 'new normals' and the changed attitudes that have emerged

Chris Baker
Founder, Totem Media



CHINA AS A RELATIVE BRIGHT SPOT FOR 2020

Covid-19 has dramatically up-ended the course of marketing in China for 2020. For over two months the country was almost completely locked down, with business-as-usual giving way to health and safety concerns. In China, Covid-19 has punished an economy which was already facing a slow, challenging year in 2020.

China has largely eradicated the spread of Covid-19 and its economy is being re-started, after a long, hard Q1. Its economy is still nowhere near full-strength but there is a growing sense of optimism and revitalization.

China is springing back from its Covid-19 hiatus.

This comes at a time where the rest of the World is mired in a massive struggle to; (1)take the required measures to isolate and suspend regular business operations, (2)respond to the profound health and public administration crises, and (3)make sense of the severe shocks to the economies and employment.

The rest of the World is in shock.

The rest of the world must first deal with the acute health challenge - and then deal with resuscitating deflated economies and businesses. In this context, China's modest recovery looks like a relative bright spot and might be one of the only growth markets in 2020.

Going into the Covid-19 crisis, China's economy was already muted and the outlook for 2020 was for very modest growth.

Consumer confidence was low - especially in Top Tier cities where rising lifestyle costs were leaving little room for spending growth. China's property market was also sagging, adding another layer of concern for consumers (whose sense of wealth has been deeply tied to property).

Brands across many sectors were grappling with significant sales and profit declines. To remedy this and sustain growth, many brands were (already) resorting to discounting and other sales incentives to stimulate sales.



'OFFICIAL' CONSUMER CONFIDENCE APPEARS STABLE

But there is growing caution and overall growth of spending has slowed

CONSUMER SPENDING IS SLOWING

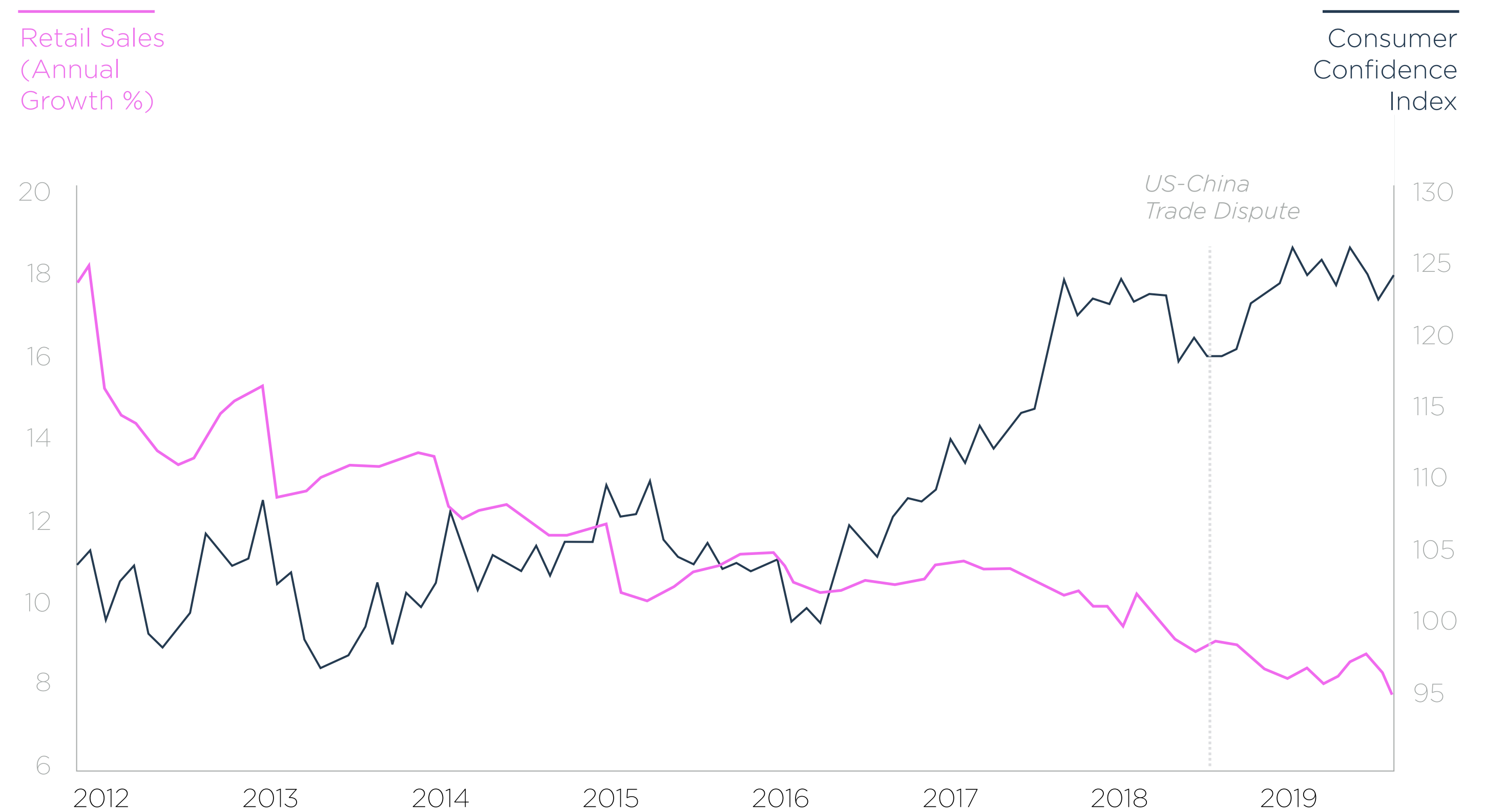
Retail growth in China is a mixed bag at the moment. Top tier cities have slowed spending considerably and are being squeezed on costs. Lower tier cities are demonstrating far more optimism and are less price sensitive.

Looking past the official government statistics (from NBS), and there is considerably more caution and concern among regular consumers in China.

Double 11 in 2019 printed new records for overall sales growth but for many brands these sales came as a result of steep discounting.

There is overall a discernible slowdown in the economy and brands need to pay heed to this in 2020.

Prior to Covid
**THIS WAS THE ANALYSIS
HEADING INTO 2020**



Source: National Bureau of Statistics

DISCOUNTING ABOUNDS

Brands are meeting this slowdown with a bevy of discounting tactics

A DISCOUNTING WAR LOOMING?

The consumption slowdown in 2019 has prompted many brands to discount more often and more creatively.

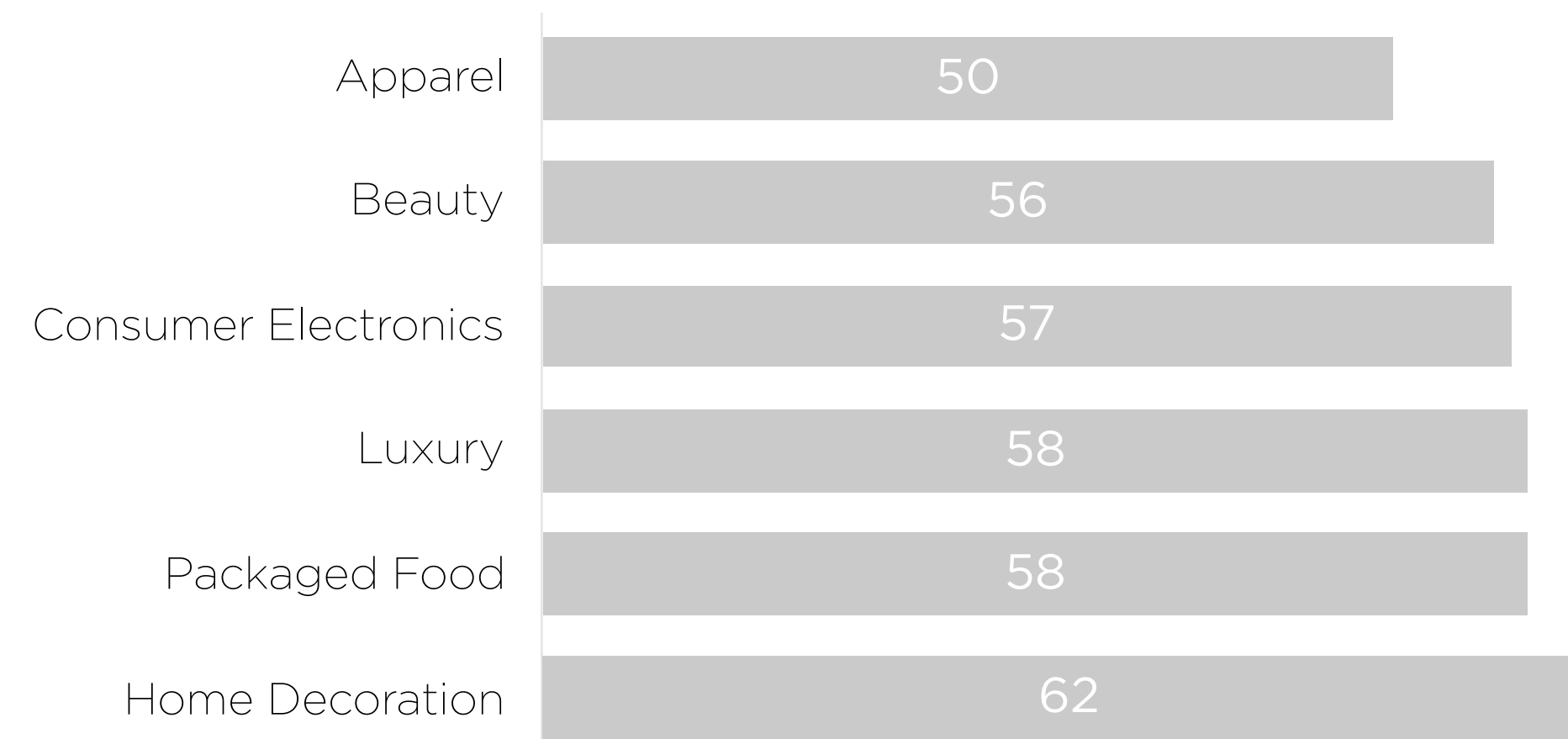
At the same time, there has been a lot of analysis on strategies for discounting. A review of consulting white papers goes to show that a lot of attention is being applied around how to boost sales, while consumers grow increasingly cautious.

Brands making these moves by competing hotly on price may do lasting damage to their brand.

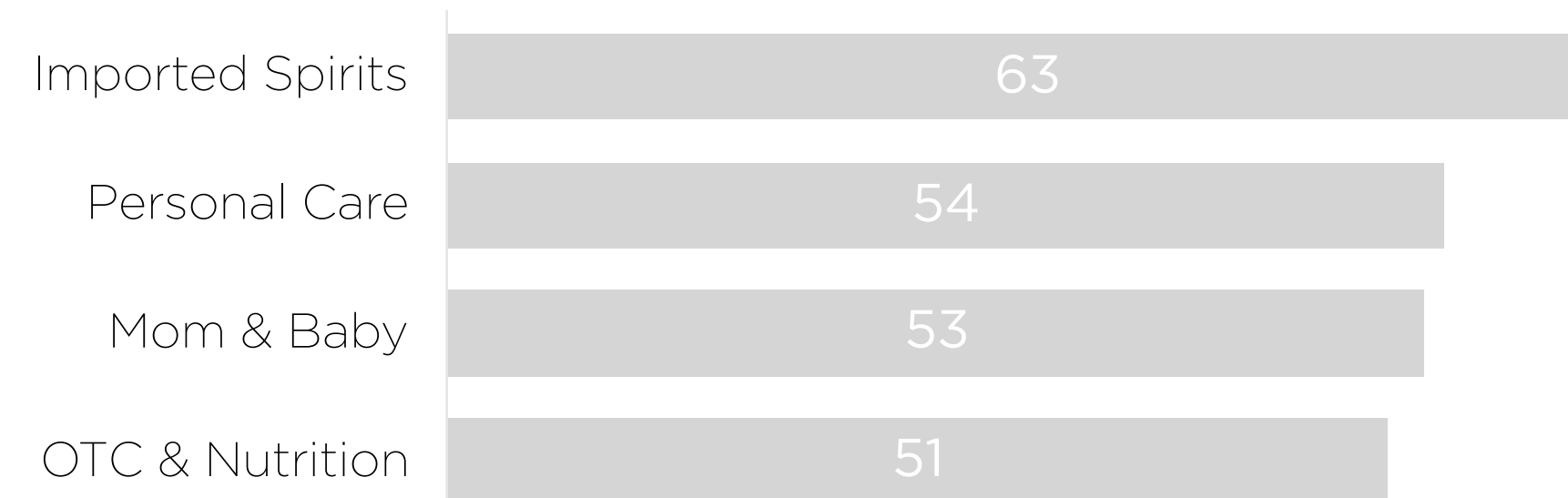
Instead of working on how to discount better, many brands should, instead be applying more attention to better branding, and better messaging.

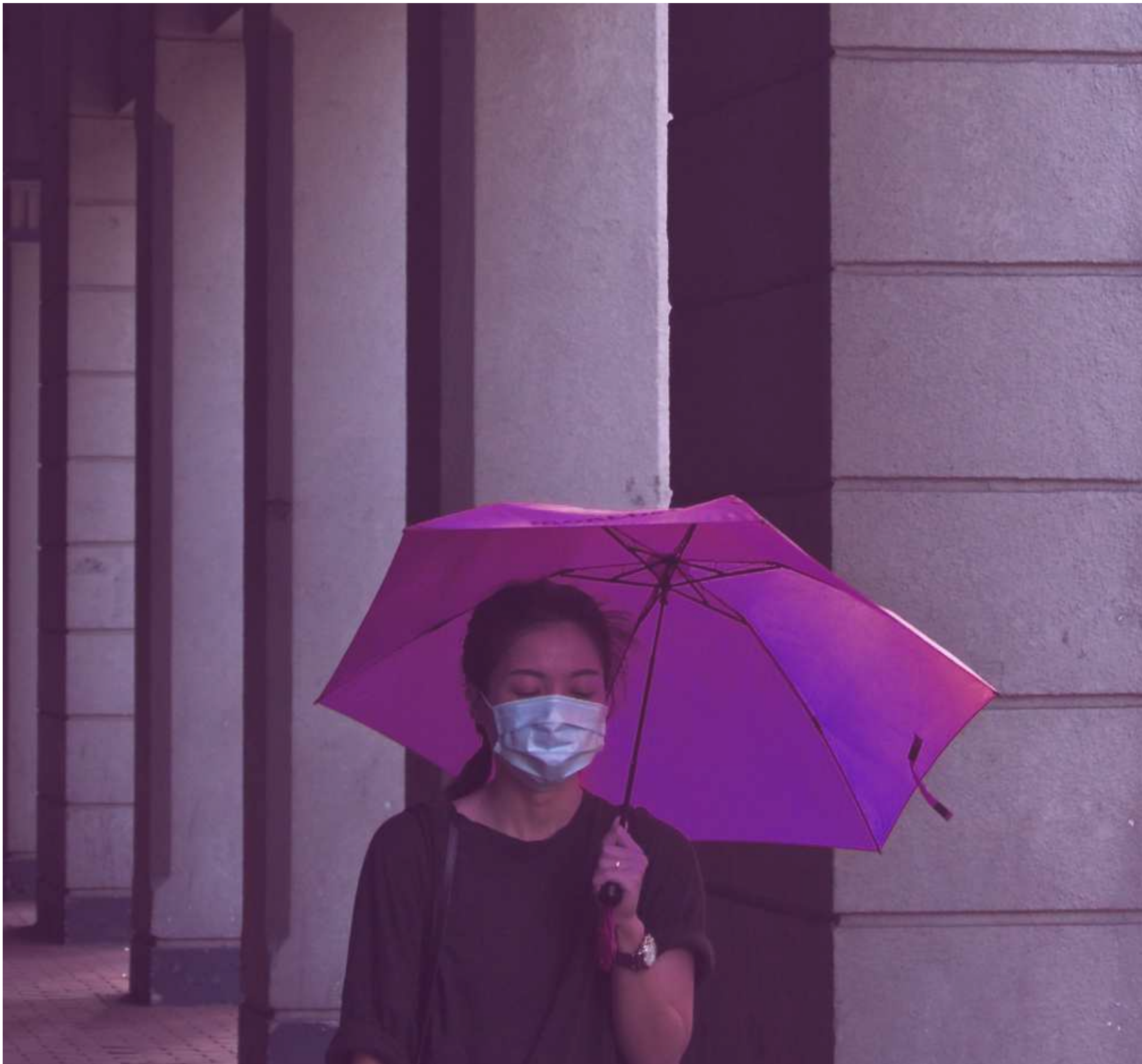
Prior to Covid
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CUSTOMERS PREFER: BIG EVENT-DRIVEN PROMOTIONS



CUSTOMERS PREFER: EVERYDAY LOW PRICES





...And then Covid-19 struck and everything ground to a halt for two months in China.

Consumers responded by decreasing shopping, shifting spend away from luxuries, toward necessities. Travel, auto, luxury, fashion have been hit hardest. Categories tied to offline retail faced dim prospects.

Digital media consumption spiked - including ecommerce. Spending on digital entertainment, basic home supplies, food, medical and health/wellness were stable-to-growing during the crisis.

Brands with stronger equity fared better - as greater emphasis was put into trust and reliability.

COVID-19 AFFECTED EVERY ASPECT OF BUSINESS

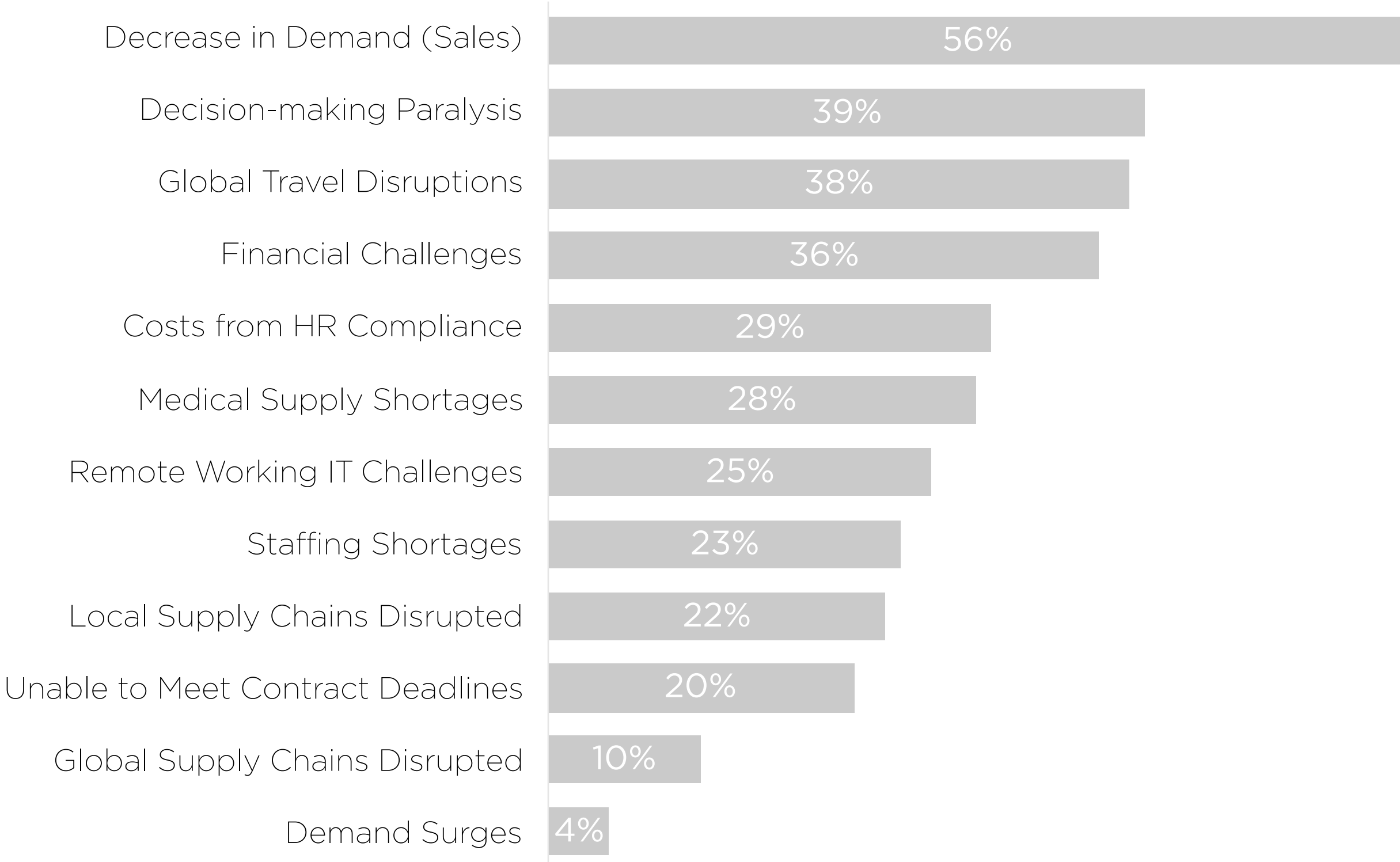
Demand (sales) decreases were the most profound challenges

During the most dire period for Covid-19 in China (Feb 5-7th), the British Chamber of Commerce surveyed members about the challenges faced at that time.

Demand shortages were the biggest challenge but Covid affected all areas of business operations.

Future-proofing businesses against these shocks include; (1)ensuring that communications can prevail during offline outages, (2)ensuring that brand/products are viewed as 'more necessary,' and (3)outfitting the entire organization with the systems and tools to keeping working even if only remotely.

HOW HAS COVID-19 AFFECTED YOUR CHINA BUSINESS SO FAR?
(AS AT FEB 5-7, 2020)



Source: British Chamber of Commerce in China
Feb 5-7, 2020

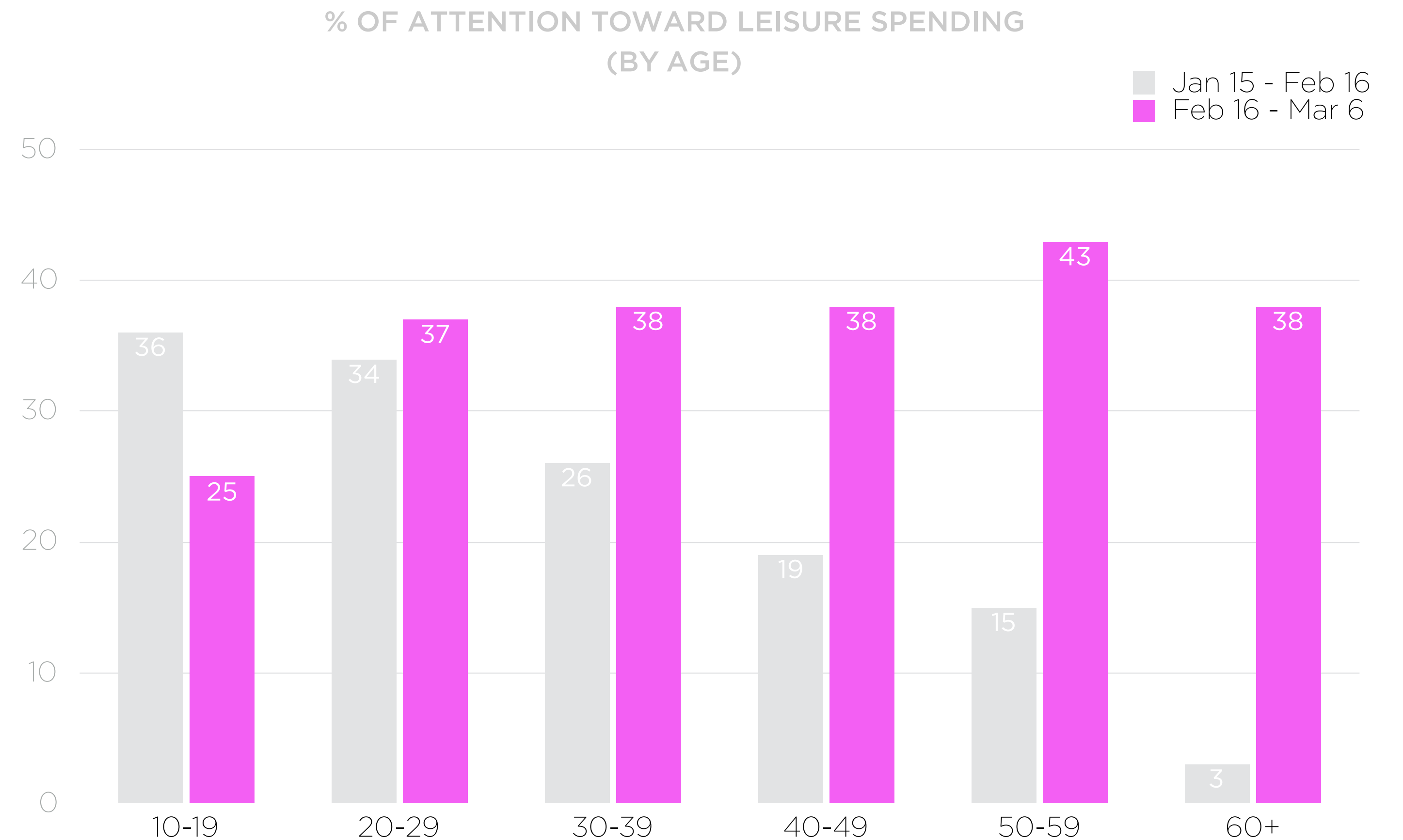
FROM “MUST HAVE” TO “NICE TO HAVE”

Attention is shifting back to leisure (nice to have’s) with the crisis (mostly) in the background

During the low-point of the Covid crisis in China, with people stuck at home and large concerns about health/safety, purchase attention shifted sharply toward necessities and “must haves” - particularly for elderly and head’s of home.

Research from Publicis at the beginning of March (6th) showed attention starting to move back to normal - with increased attention going towards “nice to have” products and activities.

Interesting to note how younger consumers during the crisis spent a lot of attention on “leisure.” This likely demonstrates the impact of digital entertainment during that time for younger audiences.



China has entered into a recovery phase - optimism is returning.

There will be an initial wave of spending, with consumers satisfying some pent up demand.

But moving forward, consumers will continue to be cautious about over-spending and confidence will take time to rebuild. So, it is likely that high priced purchases will take longer to bounce back.

China, which is already decidedly digital, will push even further in that direction. Livestreaming by brands, social engagement and ecommerce will continue to pull away from offline channels - as they will be seen as an important hedge against future risks.



OPTIMISM IN CHINA'S RECOVERY IS GROWING

Sentiment is better in higher Tier cities

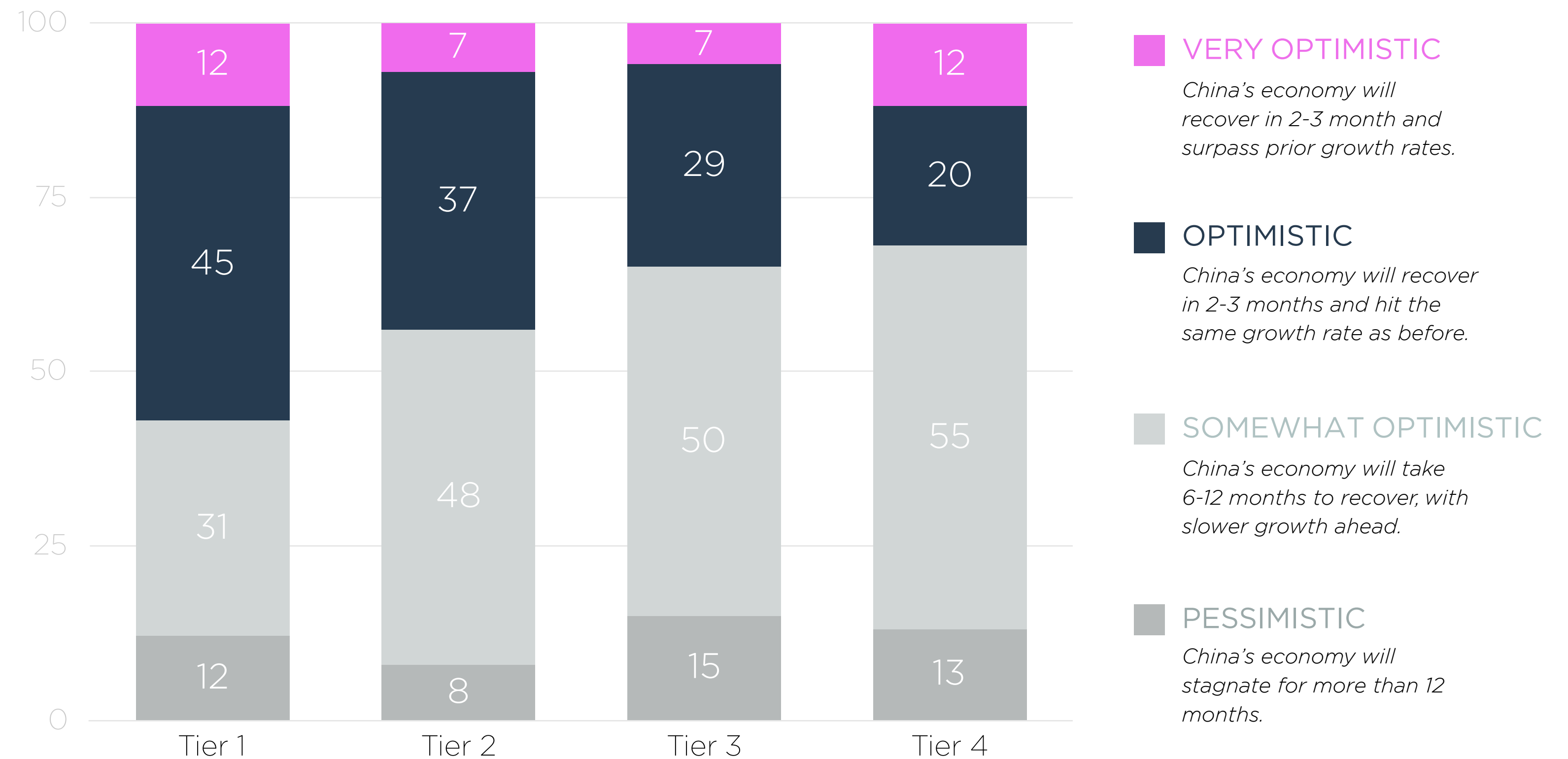
Heading into 2020, consumer confidence in China's Lower Tier cities was outpacing Top Tier cities.

Covid-19 has reversed this trend, with T1 and T2 cities now having a more positive view on; (1)the rate of recovery and (2)the ensuing growth rate after the recovery.

There is a sense in China of both relief and pride in gaining control back. So during the early days of recovery there should be positive consumer sentiment and increased spending - to satisfy pent up demand.

The medium term prospects are less clear and will depend on both a China recovery and (partially) on positive global outcomes.

HOW HIGH IS YOUR CONFIDENCE IN CHINA'S ECONOMIC RECOVERY FROM COVID?



PRE-COVID BUDGETS

FROM BRAND SURVEY IN DEC 2019, ON PLANS FOR 2020 BUDGETING

IN OUR ORIGINAL SURVEY MOST BRANDS PLANNED FOR 'UNCHANGED' OR MODEST AD SPEND INCREASES FOR THE YEAR AHEAD IN 2020.

Totem's survey was conducted in Dec 2019 and asked large, global brands about budget planning for the year ahead. 47.6% planned to increase (YOY) plans 40.5% planned for no-change.

MODEST AD SPEND INCREASES FOR 2020

The largest share of brands maintaining same budgets as 2019

MOST BRANDS TO MAINTAIN STATUS QUO

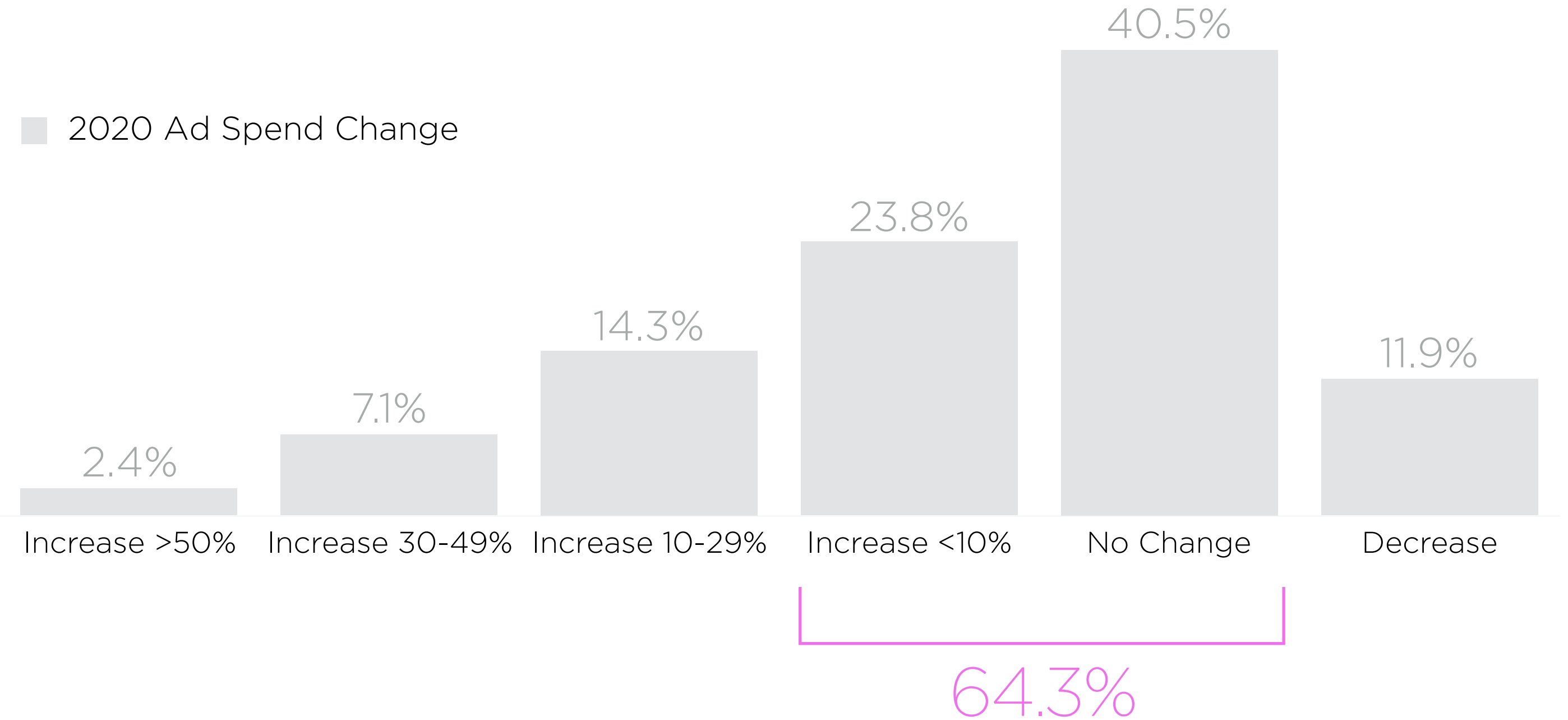
The majority of brands surveyed planned to maintain budgets similar to 2019. 88% of brands surveyed planned to either maintain or increase budgets in 2020. 40.5% of brands planned to keep the same budget levels they had the previous year.

In 2017 and 2018 (survey data from AdMaster showed that average yearly ad budget increases were at/near 20%). Based on our research, average increases are projected to be (at/near) 10% for 2020.

About the survey: At the end of 2019, Totem Media surveyed a group of 42 brands on their advertising plans for 2020. This group of brands represents a cross section of (mostly global brands) from very large to medium sized - most of which have more than ten years experience in the market.

Prior to Covid
THIS WAS THE ANALYSIS
HEADING INTO 2020

“HOW DO YOU PLAN ON ADJUSTING YOUR BRAND’S AD SPEND FOR 2020?”



DIGITAL AD SPEND TO CONTINUE GROWING

Trending ahead of overall advertising spend in China

DIGITAL WILL (AGAIN) OUTPERFORM

The majority (64.3%) of brands surveyed planned to increase digital spending in 2020.

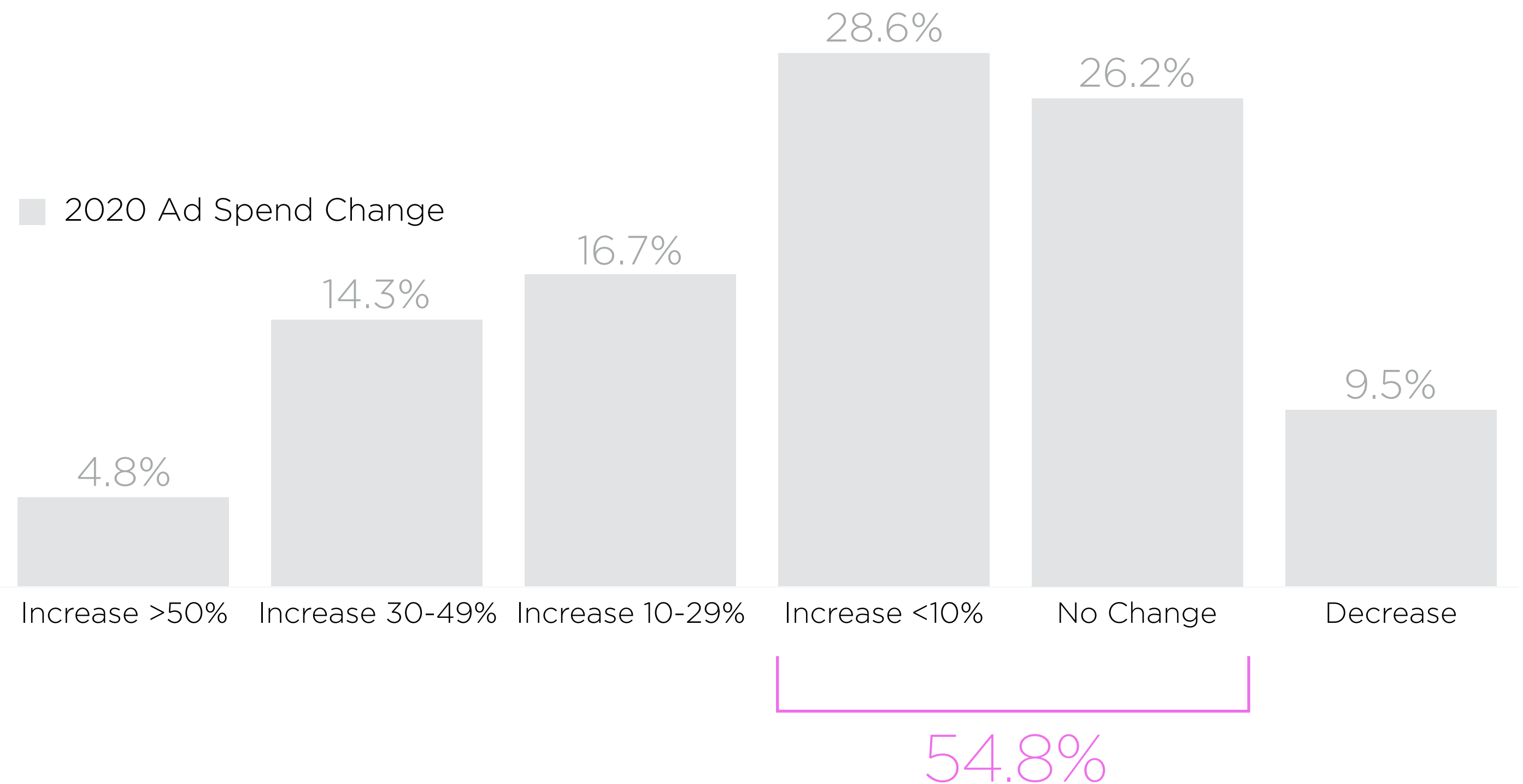
The increases planned for 2020 are however lower than the increases seen in previous years.

Spending increases average between 10-15% for 2020, where average increases in previous years were >20%.

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“HOW DO YOU PLAN ON ADJUSTING YOUR BRAND’S DIGITAL SPEND FOR 2020?”



SOCIAL MEDIA SPENDING RISES SLIGHTLY

Following a similar pattern to overall digital marketing

SOCIAL SPENDING ALSO UP IN 2020

Social media runs in parallel with digital spending. The majority (57.2%) of brands surveyed planned to increase social spending in 2020.

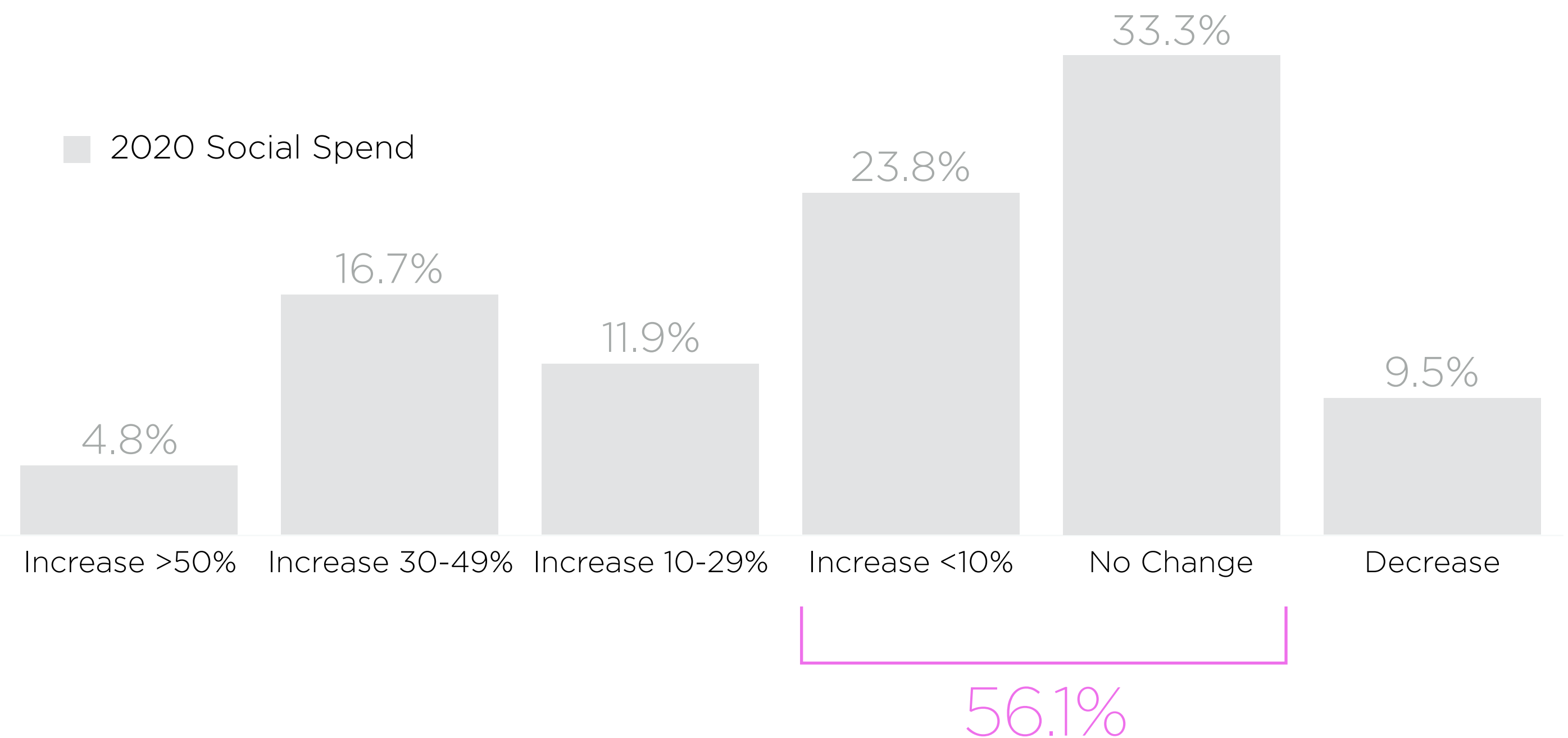
Interesting to note, that while the number of brands planning to increase spend in social and digital were similar, the increases to planned social spend were slightly higher than digital as a whole.

Several brands cited big investments planned for Douyin and other short video apps as the reasons behind the increases into social media.

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Prior to Covid
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“HOW DO YOU PLAN ON ADJUSTING YOUR BRAND’S SOCIAL SPEND FOR 2020?”



ACTUAL 2020 BUDGETS

BRAND SURVEY IN MARCH 2020 COVERING DURING/AFTER COVID

ON THE WEEK OF MARCH 23, 2020
TOTEM DID ANOTHER SURVEY TO
COLLECT UPDATED INSIGHTS ON
BUDGETING, SALES AND STRATEGIES.

*The survey included 75% of the same brands from our original
survey, with some omissions/substitutions.*

BRANDS SURVEYED, INDUSTRIES/CATEGORIES COVERED

*Survey was of senior brand/marketing staff per company

n = 37
(Brands)



(March 23-25, 2020)

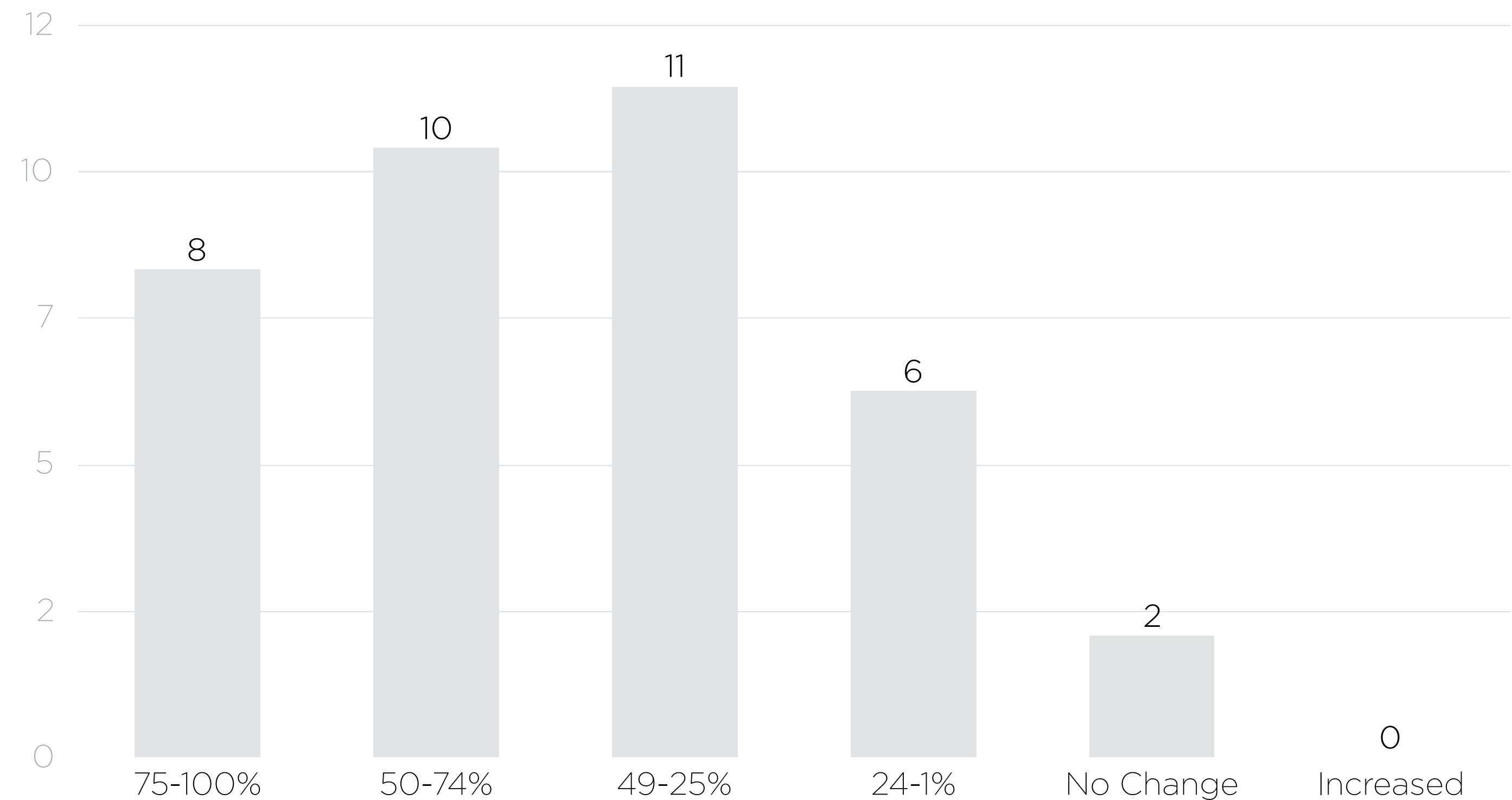
DURING THE HEIGHT OF COVID ISOLATION IN CHINA

All but two brands decreased planned spend during Jan/Feb 2020

Almost all brands pulled back sharply on spending during Jan/Feb (Peak of Covid lockdown).

Only two of the 37 brands surveyed spent to the original 2020 budget. It should be noted that both of those brands had products which sold well during the lockdown.

HOW DID YOU ADJUST AD SPENDING?
(AS PERCENTAGE OF PLANNED 2020 SPEND)



BELOW ORIGINAL PLAN

DURING THE HEIGHT OF COVID ISOLATION IN CHINA

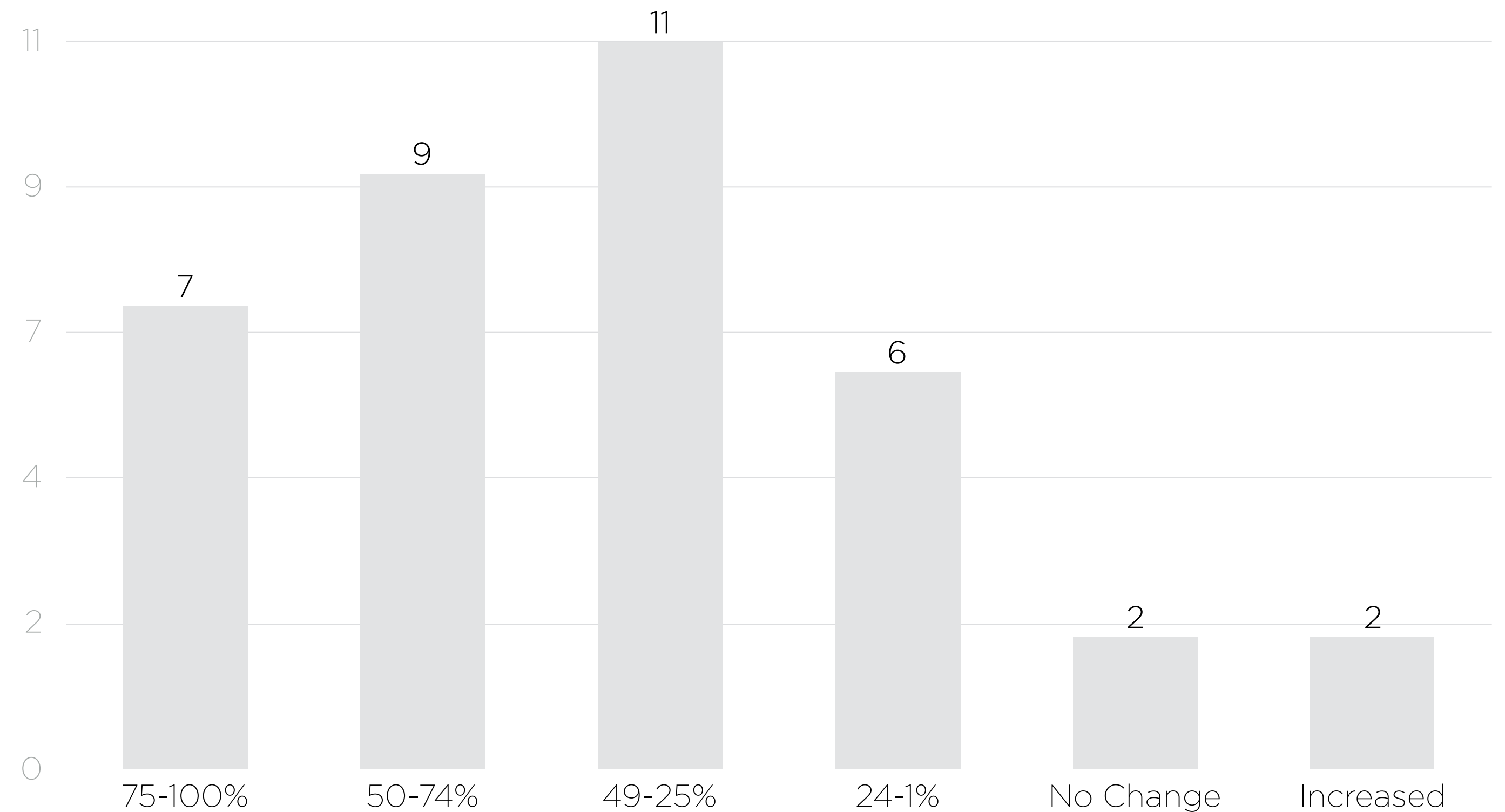
Most brands saw steep overall sales declines in Jan/Feb

All but four brands saw total (y/y) revenue drop, when compared to same months in 2019.

43% of the brands surveyed had sales declines of more than 50% during the depth of Covid in China.

For the brands that had positive overall sales performance, there were several key factors in success: (1) products were desirable, (2) brands had high equity/trust, and (3) the products were online capable with reliable fulfillment in place.

HOW WERE SALES AFFECTED - COMPARED TO JAN/FEB 2019?
(OVERALL OFFLINE AND ONLINE SALES)



Y/Y DECLINE FROM 2019

DURING THE HEIGHT OF COVID ISOLATION IN CHINA

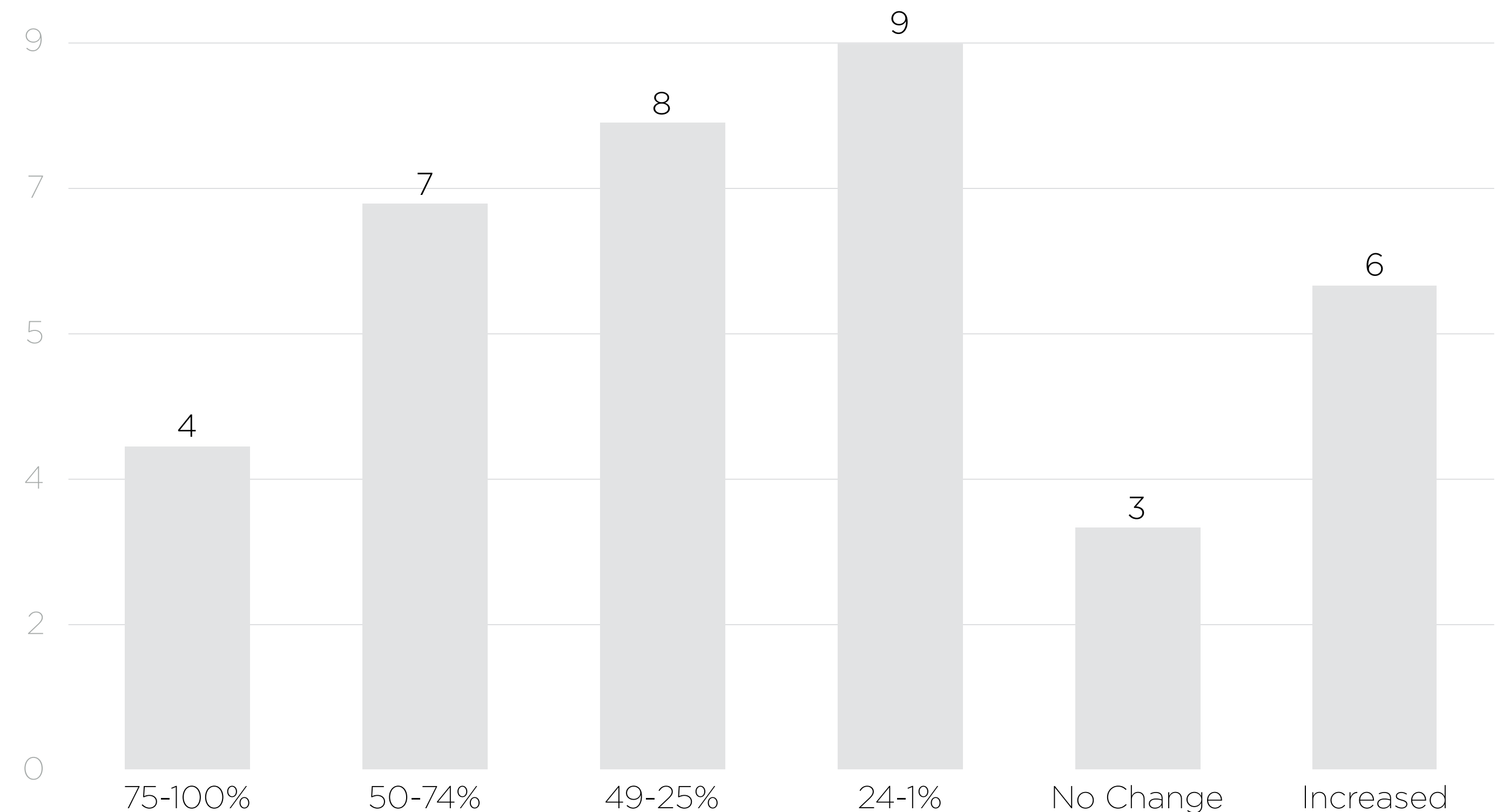
While total sales were negatively affected, online sales were more buoyant

Online returned much better results than offline during the crisis.

For many products/categories, online was (at one point) the only viable channel to buy from. And for brands with 'necessity' products, the results online were excellent. 24.3% of brands either maintained/improved online sales over 2019 (during the lockdown period).

For many/most brands offering 'nice to have' products, total sales were down but online sales were a relative bright spot. Sales declines for online were much less severe than the declines from offline.

HOW WERE SALES AFFECTED? (ONLINE ONLY VS JAN/FEB 2019)



Y/Y DECLINE FROM 2019

HOW HAVE ONLINE SALES BOUNCED BACK?

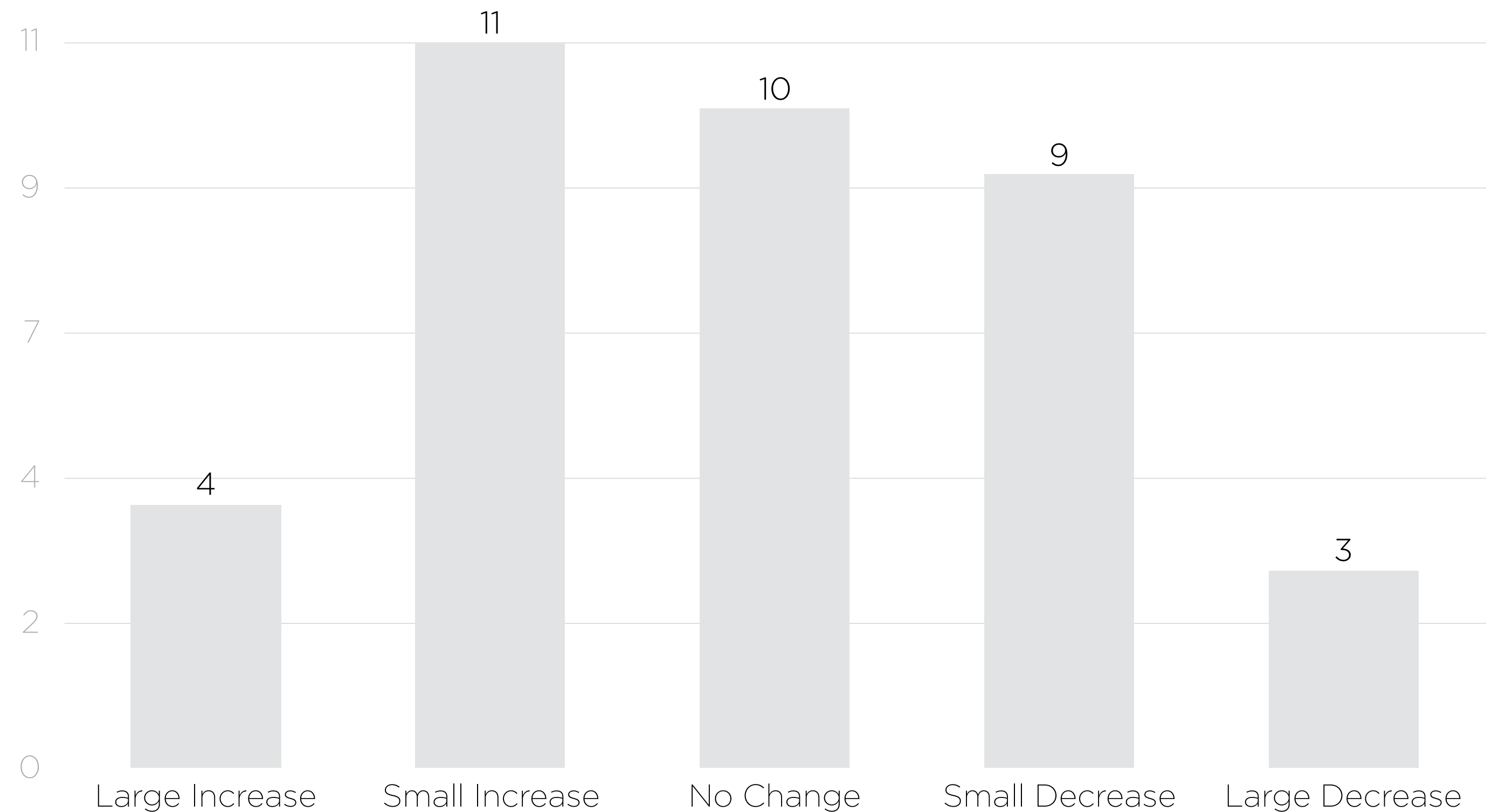
For most brands, the digital share of sales has not been too damaged by Covid

Online sales have also bounced back quicker than offline sales. Customers still worried about going to retail shops have stayed online instead.

67% of brands surveyed have either stayed even with, or improved on same-month online sales from from 2019.

The brands showing the largest decreases online were brands with higher priced, non-essential products (or low brand equity).

HOW HAVE **ONLINE SALES** PERFORMED IN MARCH (TO-DATE)?
(WHEN COMPARED TO MARCH 2019)



HOW WILL YOUR BRAND ADJUST SPENDING IN Q2

Most brands approaching Q2 with modest optimism

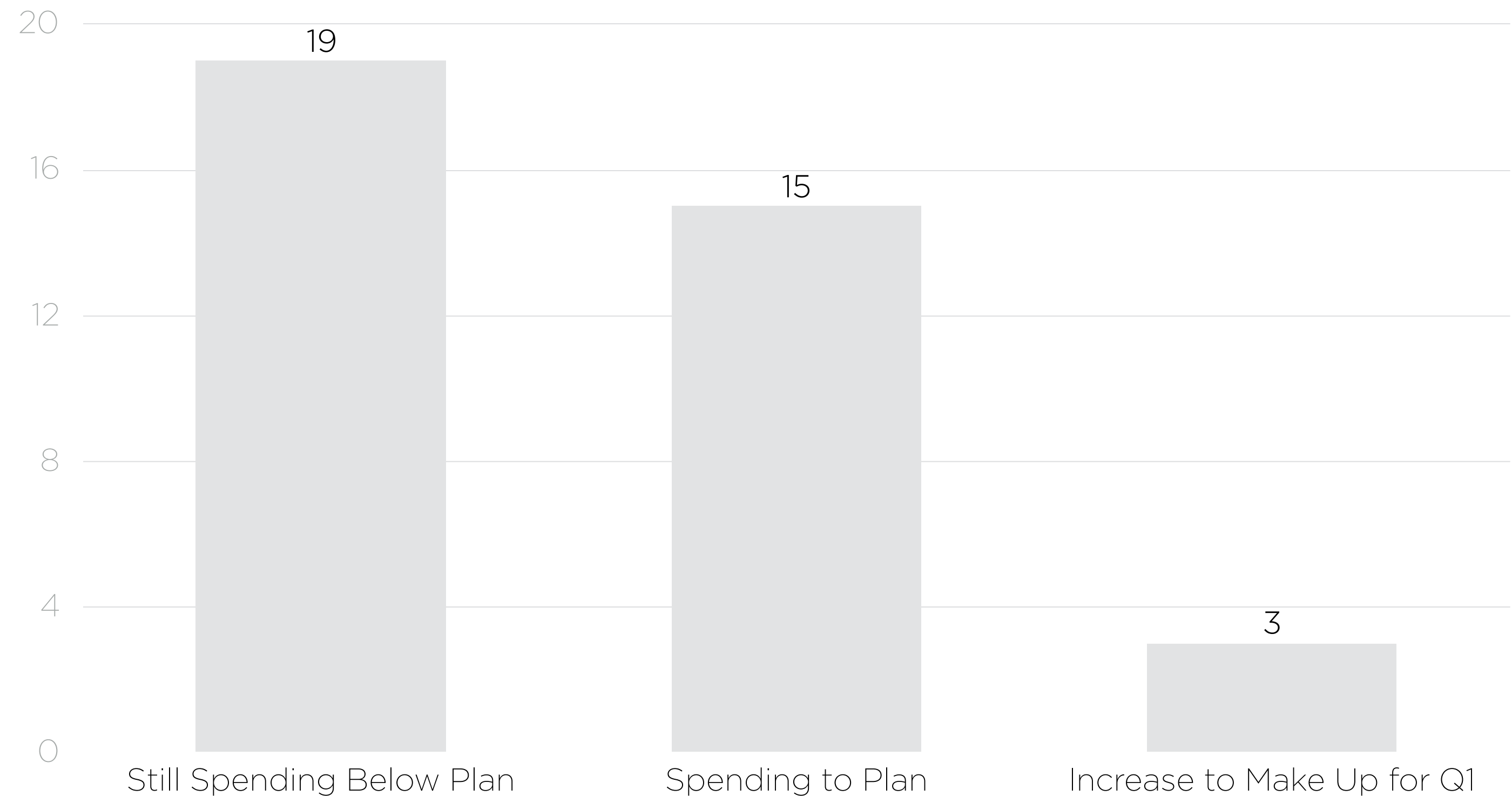
Most brands are still very cautious about the upcoming quarter and most are still spending below original 2020 plans until they are confident in recovery.

There are some global brands who are asking their China offices to withhold spending for use of budgets to cover expected losses in home markets.

And a few brands who had success during the crisis are spending more to maintain momentum gained during Covid.

For global brands, China could be a rare opportunity to achieve some measure of growth, when prospects for other markets are very poor.

HOW WILL YOUR BRAND ADJUST SPENDING IN THE UPCOMING QUARTER?
(WHEN COMPARED WITH ORIGINAL 2020 PLAN)



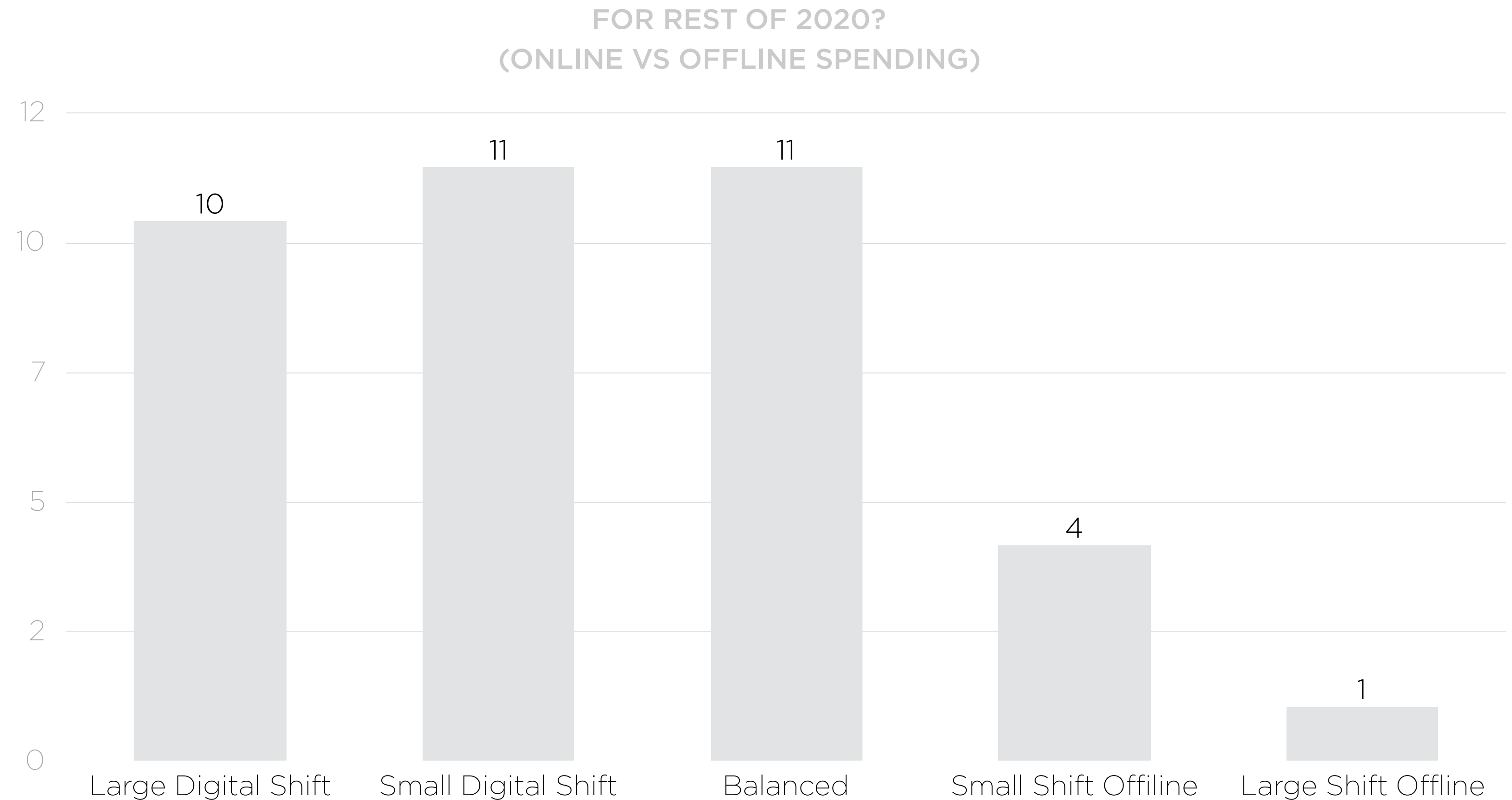
HOW WILL YOUR BRAND RE-BALANCE SPENDING

Most brands will focus on further digital transformation (comms. and ecommerce)

For most brands there will be a greater priority given to digital communications, advertising and ecommerce to fuel growth. Even in China - *already a distinctly digital market* - there is greater focus on building further digital infrastructure.

Some brands who rely on offline retail are concentrating efforts toward offline, in order to jumpstart a recovery there. But these brands are in the minority, with most brands viewing digital as means to continuity.

There is some concern in the background that if the virus re-surfaces, it is better to be digitally ready and not risk further harm to offline efforts (as they are most vulnerable).



KEY DIGITAL CHANNELS FOR THE REST OF 2020

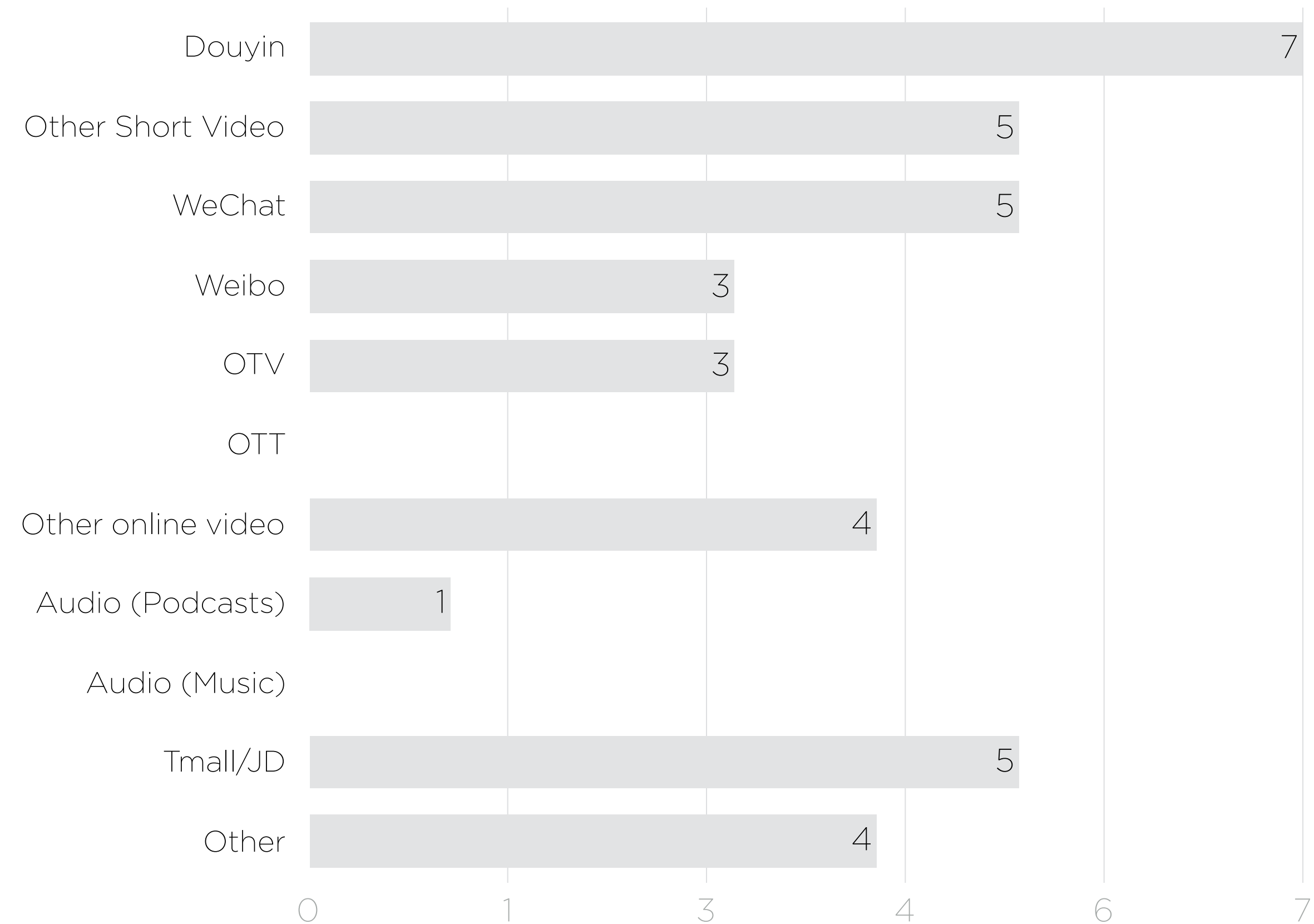
Video, core social and ecommerce sites to see greatest increases

The priority for most brands is still on supporting sales and ensuring that revenues rebound as quickly as possible.

To this end, essential ecommerce channels, such as Tmall and JD, together with core communications hubs such as WeChat and Weibo are viewed as priorities.

Douyin and other video channels - which saw major spikes in user time during the 'shelter-in-place' period - also stand to benefit with advertisers.

WHAT DIGITAL CHANNEL WILL YOUR BRAND FOCUS INVESTMENTS ON?

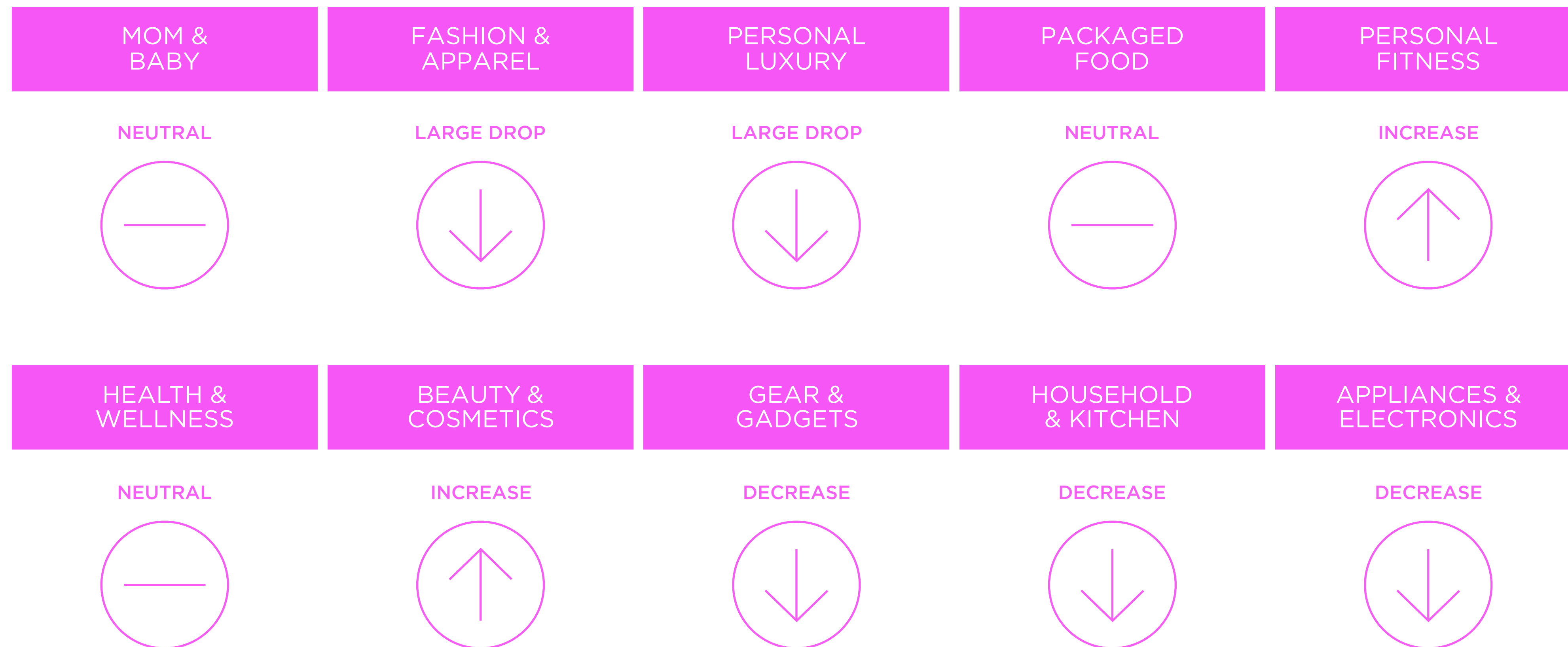


INSIGHTS ON RECOVERY

WHAT ARE THE CORRECT, NEXT MOVES FOR BRANDS IN RECOVERY

HOW CATEGORIES PERFORMED DURING THE OUTBREAK

*Overall sales performance, based on feedback from the Mar 2020 Totem Brand Survey



**Of eight beauty brands, two had large increases during Covid, the remaining six had no-change or small decreases.*

THIS EVENT AND THE RESULTING
ECONOMIC IMPACT, WILL SPEED UP
THE STRUCTURAL CHANGES THAT
WERE ALREADY OCCURRING.

*Insight: Digital (ecommerce and comms) excelled during the crisis
and coming out of the crisis, will pull ahead further.*

COVID HAS STIMULATED NEW BEHAVIORS

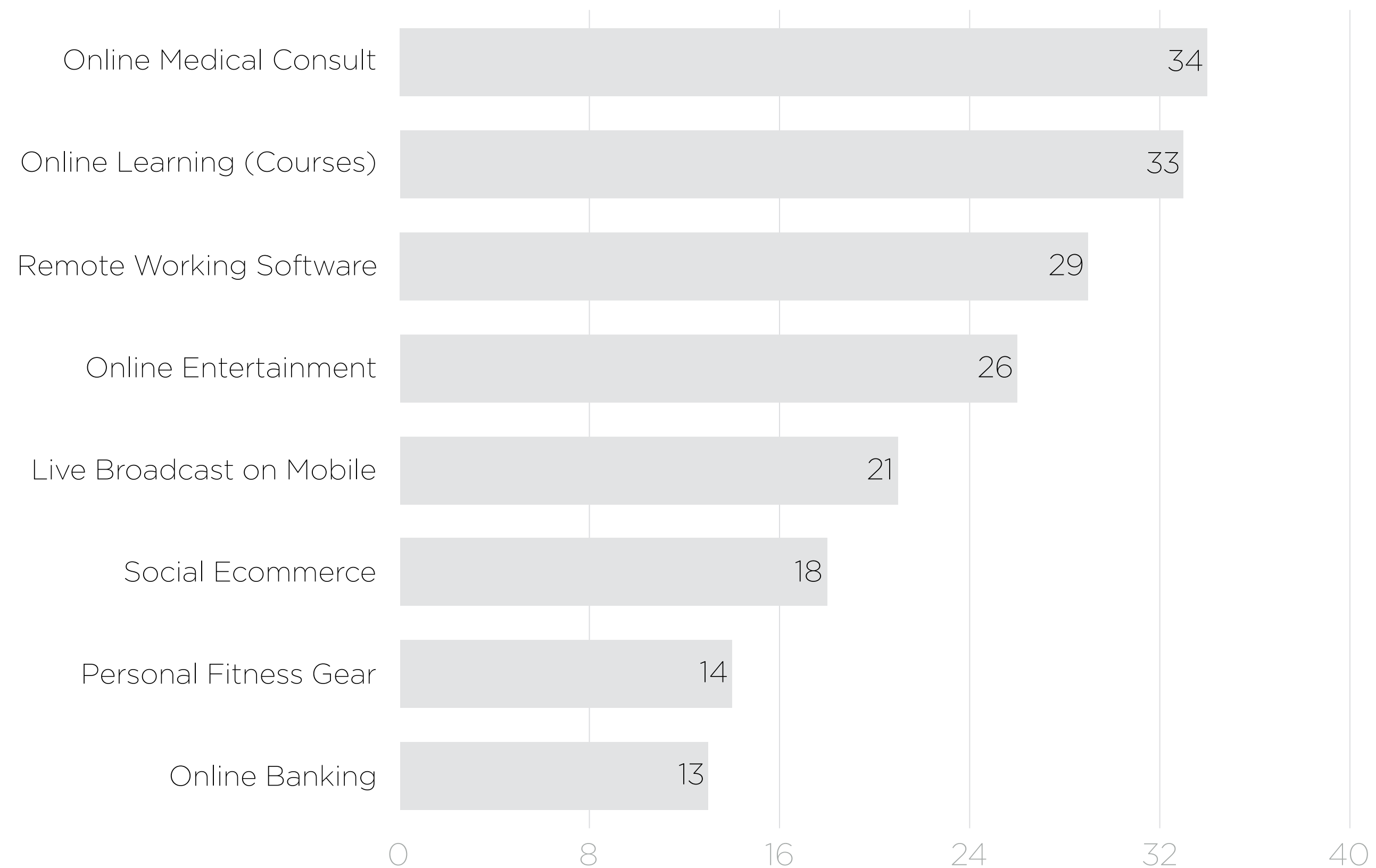
With large numbers of consumers starting new routines and technologies

According to research from Kantar, 84% of consumers tried at least one new service/product during the Covid outbreak.

Many of these new behaviors focus on digital media, remote working, consultations and home-based activities. Brands have responded to this by increasing the use of live-streaming, video content and chat initiatives.

Look for live-streaming and social commerce (inc. Private Traffic) to become an even larger part of the marketing playbook moving forward. Also look for customer service and marketing to become fused more tightly together through these initiatives.

FIRST ATTEMPTS - NEW PRODUCTS/SERVICES USED DURING COVID



“Think of a recession as a sharp curve on an auto racetrack—the best place to pass competitors, but requiring more skill than straightaways. The best drivers apply the brakes just ahead of the curve (they take out excess costs), turn hard toward the apex of the curve (identify the short list of projects that will form the next business model), and accelerate hard out of the curve (spend and hire before markets have rebounded).”

*Bain 2019; Beyond the Downturn:
“Recession Strategies to Take the Lead”*

RESPONSE IS ABOUT MORE THAN COST CUTTING

Digital capabilities and customer empathy are critically important

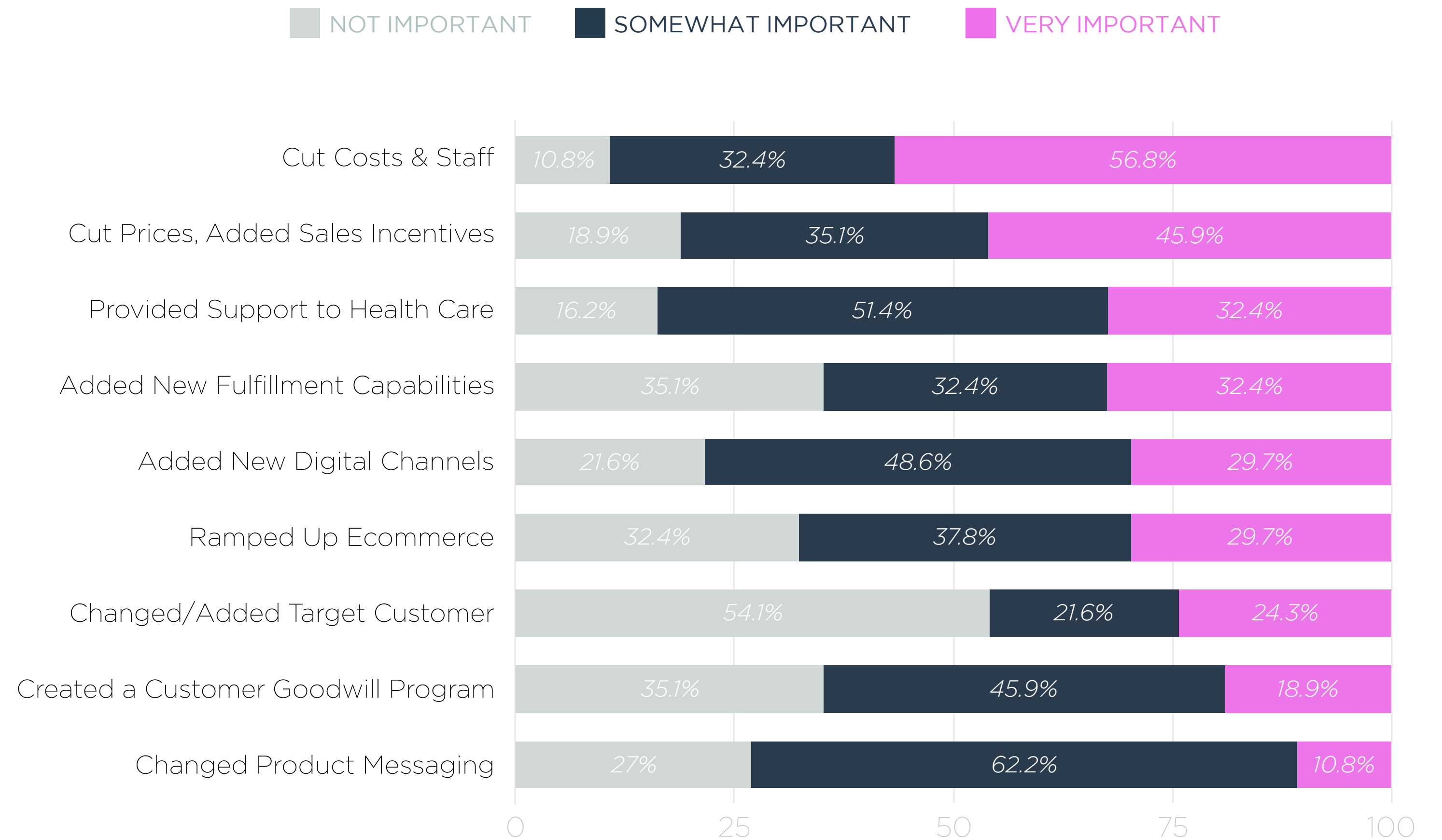
The first response by most brands during the early days was to cut costs and drop prices in order to manage cashflow challenges.

Brands next focused on activating new channels - in order to support customers across a wider range touch points (particularly digital).

Brands that succeed in recovery will continue to; (1)have open channels with customers, (2)understand their changing needs/challenges and, (3)adapt messaging and values to these needs.

Among the most important new initiatives for brands were; (1)scaling-up video chat with customers (eg. live-streaming between retail staff and customers) and, (2)group chats (private communities on WeChat).

WHAT IMPORTANT ACTIONS DID YOUR BRAND TAKE IN RESPONSE TO THE CRISIS?



PROJECTING AUDIENCE BEHAVIOR CHANGES (POST RECOVERY)

DEMAND

There will be a short-term bounce in sales, with consumers satisfying 'pent up demand.'

But questions about the economy remain. A lasting effect of Covid will be for purchases to be more 'considered,' as consumers spend their RMB (\$) more wisely. Consumers are likely to make fewer purchases of better quality (vs. more of lesser quality).

Brands will also need to understand new paradigms of customer behavior (and utility).

There was a massive social change imposed by Covid and customers will carry some routines and perspectives forward. There will be products that seem less necessary now, new products that have become essential, values and ethics that inform choices more and financial constraints that all change decision making.

BRAND (TRUST)

Consumers have had their trust in many facets of life eroded over the past several months. Issues of trust, quality and reliability will be critically important.

Quality matters more now than ever before. Consumers want things that work.

Customers will also want brands that help, not 'harm.' Questions of provenance, ethics, and humanity will be elevated. Brands that can demonstrate purpose and ethics will become more coveted.

And, in turbulent times, customers will also favor brands that signal reliability and staying power to the market. No point in buying something from a brand that might go out of business in a month or two!

DIGITAL CHANNELS

People will return to shopping offline, dining out and traveling. There is/will be large pent up demand to do all of those things in the coming few months.

However, online will gain further ground across all brand-consumer touch points AND will now be seen as a critical hedge against future risks such as those posed by Covid-19 (or similar disruptions to offline operations).

Consumers turned to big reliable ecommerce sites like Tmall/JD and these channels will likely retain the gains made during Covid.

At the same time, private (traffic) groups on WeChat organized around local communities should continue to be purposeful - especially if there is a bias toward 'more local.'

FULFILLMENT

Fulfillment has never appeared more important than in the last few months. Sure, customers will still measure deliveries based on speed ("same day delivery") but there is a whole new set of questions and concerns raised by Covid;

1. *Can you actually deliver to me under duress?*
2. *Are your deliveries safe?*
3. *Do you treat your workers with care, compassion and respect?*

There is/was also a lot of unfulfilled customer demand, with brands who simply did not have enough product on-hand (in the right channels).

It will be critical to monitor customers more closely to evaluate demand moving forward (and apply insights to merchandising - allocating product to the right channels more efficiently).

CUSTOMER SUPPORT

Consumers are looking for brands to be more engaged.

Service and support should be elevated in the marketing toolkit. Good customer response is good marketing.

This service and support has to work across a multitude of channels now. If someone can't get to your shop, you better have chat capabilities on social, and videoconferencing and livestreaming.

REFRAMING **BRAND** SUCCESS FACTORS DURING RECOVERY

DEMAND

For brands with products seen as necessities, life is good right now (if demand can be satisfied).

Many brands will need to quickly adapt to new consumer attitudes. Habits have changed and will continue to change as a result of Covid (and the economic recovery).

It is imperative for all brands to understand shifts in demand and the habits driving the changes that are taking place.

When these consumer behaviors/attitudes are ascertained, brands should respond with ads (communications) which match hero products to these interests.

Category leading products should take an even larger place in communications plans - as they signal trust/quality.

BRAND (TRUST)

Consumer confidence is strained and purchase decisions will be much more considered/scrutinized.

Brands who have strong equity (trust) are well positioned to gain from consumer scrutiny.

Across all categories, brands must redouble efforts to build trust and confidence with consumers. Direct video engagement, customer service/response will be important tools.

Brand communications are important in signaling staying power, trust and values. The type of brand messaging that deliver on this goal, are the big, bold messages that remind audiences that the brand plays a big role in audiences lives'.

DIGITAL CHANNELS

During Covid, many brands who had in-demand products and strong brand equity ...were let down by not having strong enough digital presence.

Many brands will want to perform digital audits to ensure that the channels in place are performing effectively. Ecommerce, social, search, video and online customer support functions all must be working in concert.

FULFILMENT

There have been many stories come to light in the past few months of brands who have strong product demand, brand equity, digital channels and still got caught without being able to fulfill demand - in many cases because there was no more product in stock (or stock was mis-allocated to the wrong channel).

Consistent review of consumer behavior and intent during the months ahead will help to better plan inventory and product merchandising priorities.

Inventory - merchandising - marketing need to be operating in lockstep. Dashboards which match up inventory-channels-marketing-audiences provide this type of insight.

CUSTOMER SUPPORT

Customer support has often been seen as an after-though for marketers but in the months ahead, brands must; (1)take a customer centric view on marketing (demonstrate understanding, empathy), and (2)implement a wider set of channels to connect with.

Customer support initiatives - *now, more than ever* - are critical to winning sales in the months ahead. Customer service/response plays a key role in propping up the entire marketing stack now.

As demonstration of this, many brands have moved entire retail teams online to engage with customers

CATEGORY SPECIFIC RECOMMENDATIONS

What issue/remedy is most critical during 'recovery'

MOM & BABY

The Covid lockdown exposed baby/mom brands'; (1)insufficient brand awareness (therefore low trust), and (2)inadequate use of high-engagement social and content. These brands should look to do quality video, including livestream to ignite brand equity.

FASHION & APPAREL

Fashion brands did not fare well during Covid. The immediate goals should be to re-engage with consumers and celebrate new beginnings. Discounting and other incentives - especially for loyal customers - should be implemented.

PERSONAL LUXURY

Luxury brands should concentrate on core customers with very focused, high-quality (and personalized) engagements and service. Massification tactics should also be implemented to connect with consumers who now have reduced spending power.

PACKAGED FOOD

For many packaged foods brand (the ones that didnt see growth), the Covid lockdown exposed insufficient online presence/awareness. Now is the time to fix this by building out more complete digital infrastructure.

PERSONAL FITNESS

Personal fitness brands who saw growth should be mostly focused on supporting new practitioners to continue the routines they established during Covid - consolidate the gains! And, in doing so, should aim to stimulate user-get-user and WOM activities. Private communities and content.

HEALTH & WELLNESS

The health/wellness brands in our survey did just OK during the Covid lockdown. Arguably they should have performed better, but lack of brand trust and (in some cases) insufficient online support for sales let them down.

These brands need to invest in more online customer support and chat (eg. livestream consultation). They should look to beauty brands for how to do this.

BEAUTY & COSMETICS

Sharply divided results in this category demonstrate that BRAND EQUITY is critically important in being resilient. The better brands did very well, whereas the weaker brands lost ground during the lockdown.

Trust, quality and provenance played critical role in success (or lack of).

GEAR & GADGETS

Gadget/gear brands who did not do well during the lockdown will need to; (1)re-evaluate the changing habit/routines of consumers and (2)map onto these new routines, a clear, condensed product offering (possibly streamlining the products they offer to the market).

HOUSEHOLD & KITCHEN

Household product brands that did not succeed over the last few months generally fell short in not having sufficient online presence to support sales and customer enquiries. Video (livestream) and social engagement are key.

Some thinking also needs to go into mapping new customer behaviors and how these brand fit now.

APPLIANCES & ELECTRONICS

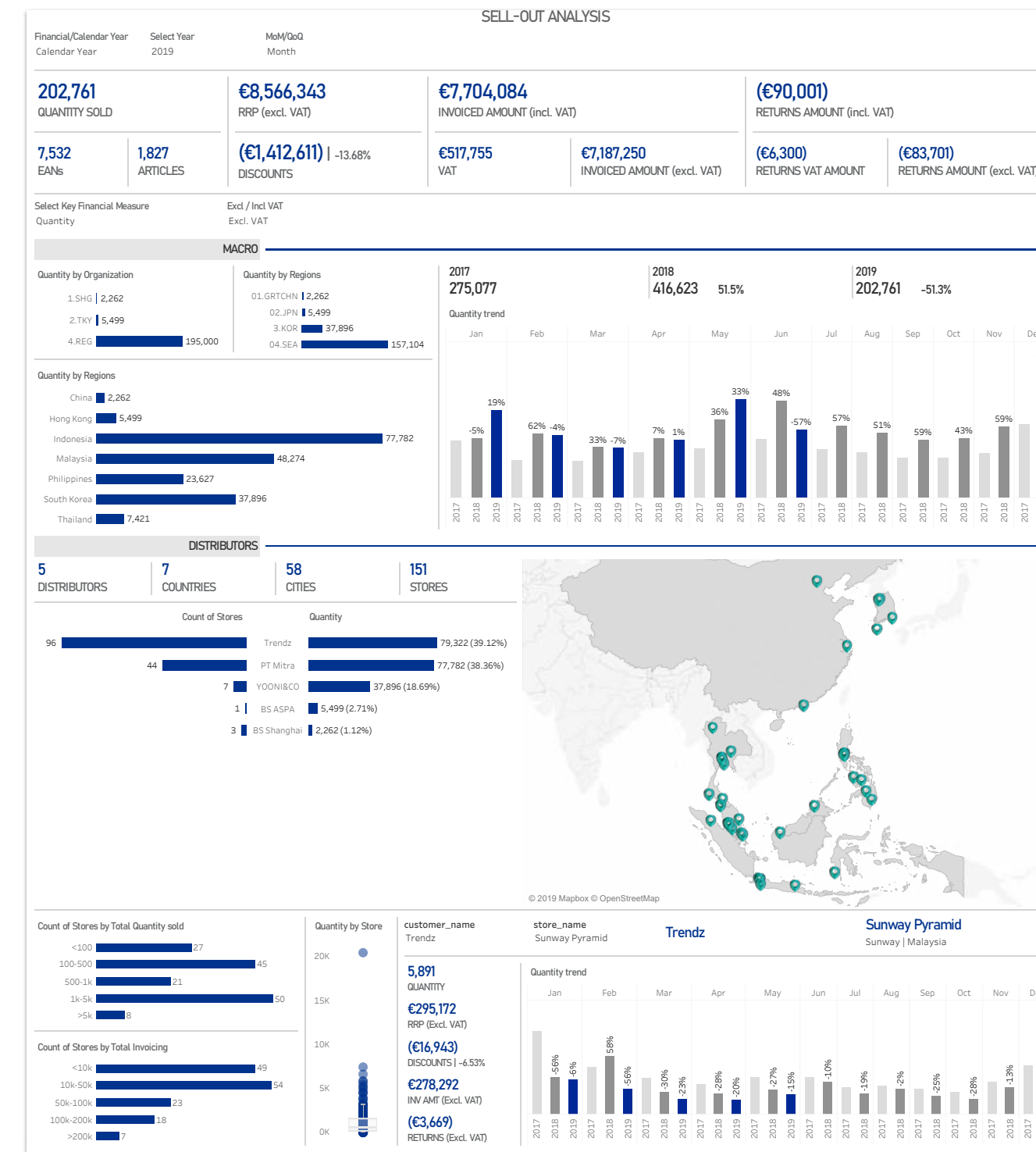
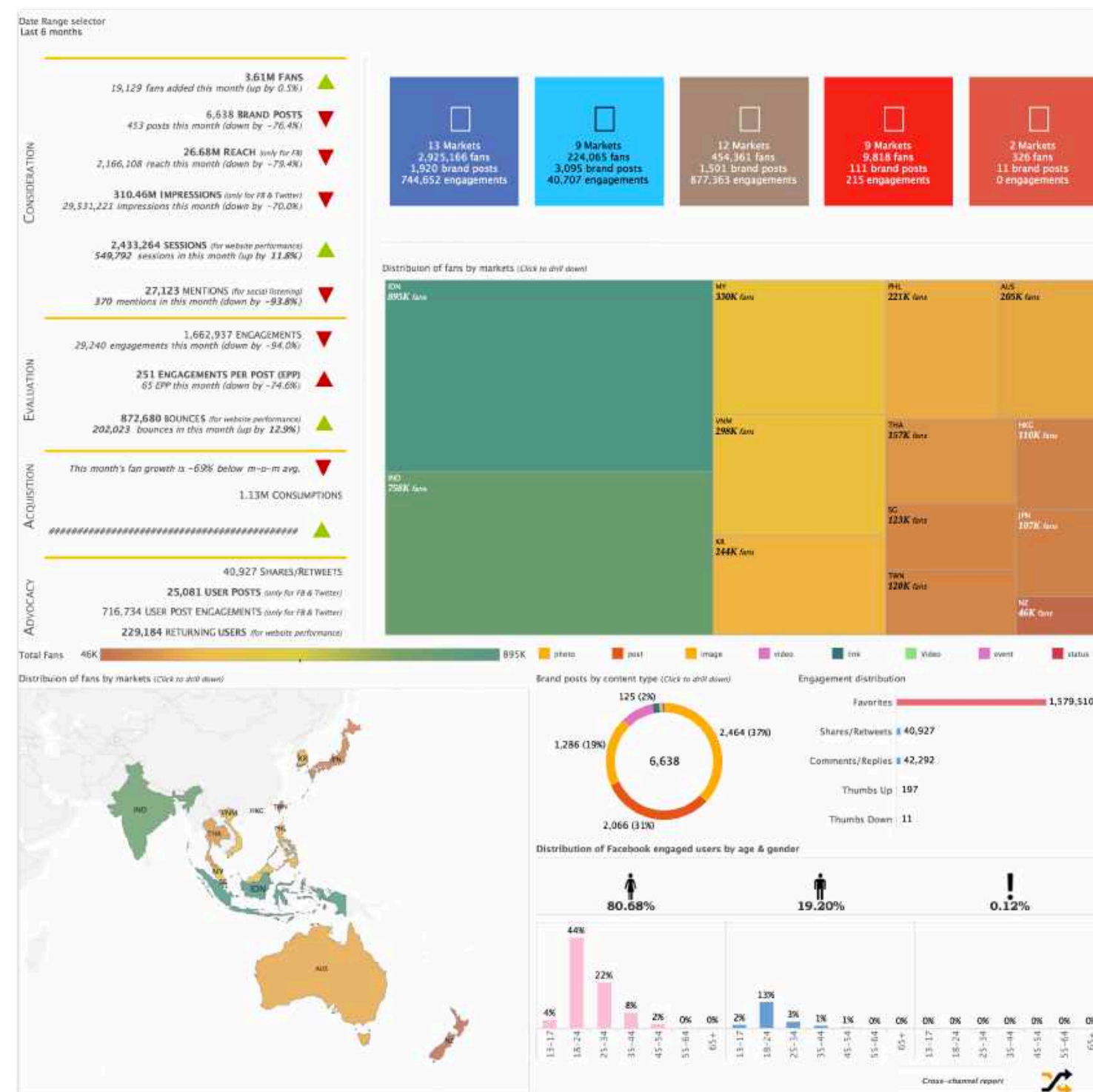
Appliance brands that did not succeed over the last few months generally fell short in not having sufficient online presence to support sales and customer enquiries. Video (livestream) and social engagement are key.

TOTEM

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BUSINESS INTELLIGENCE, DATA DRIVEN BRANDING

Totem works with a range of brands globally, in APAC and China, on brand strategy and business intelligence solutions.

Our clients range across industries, including; retail, fashion, beauty, travel, entertainment and finance.

Business intelligence and data visualization projects for our clients address critical issues including; market positioning, new product launches, sales performance, marketing ROI, and social media optimization.

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