



# *Post Covid-19: A Brand Blueprint for the Future*



GLOBAL DECK  
MAY 2020



# Methodology: how we worked

## A desk research approach, leveraging multiple data sources and types of expertise

- > Desk analysis
- > Case studies
- > Google search intents
- > Newspaper articles
- > Secondary data
  - (including trend and futurology research from around the globe)
- > Daily updated content on
  - Social media
  - News (TV, web, paper)
  - Field observation and cultural decoding in each Country





# Our International Community: the 17 Countries involved in the study



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# Agenda



**Executive  
summary: each  
chapter in a  
nutshell**



**The current  
situation  
around the  
world**



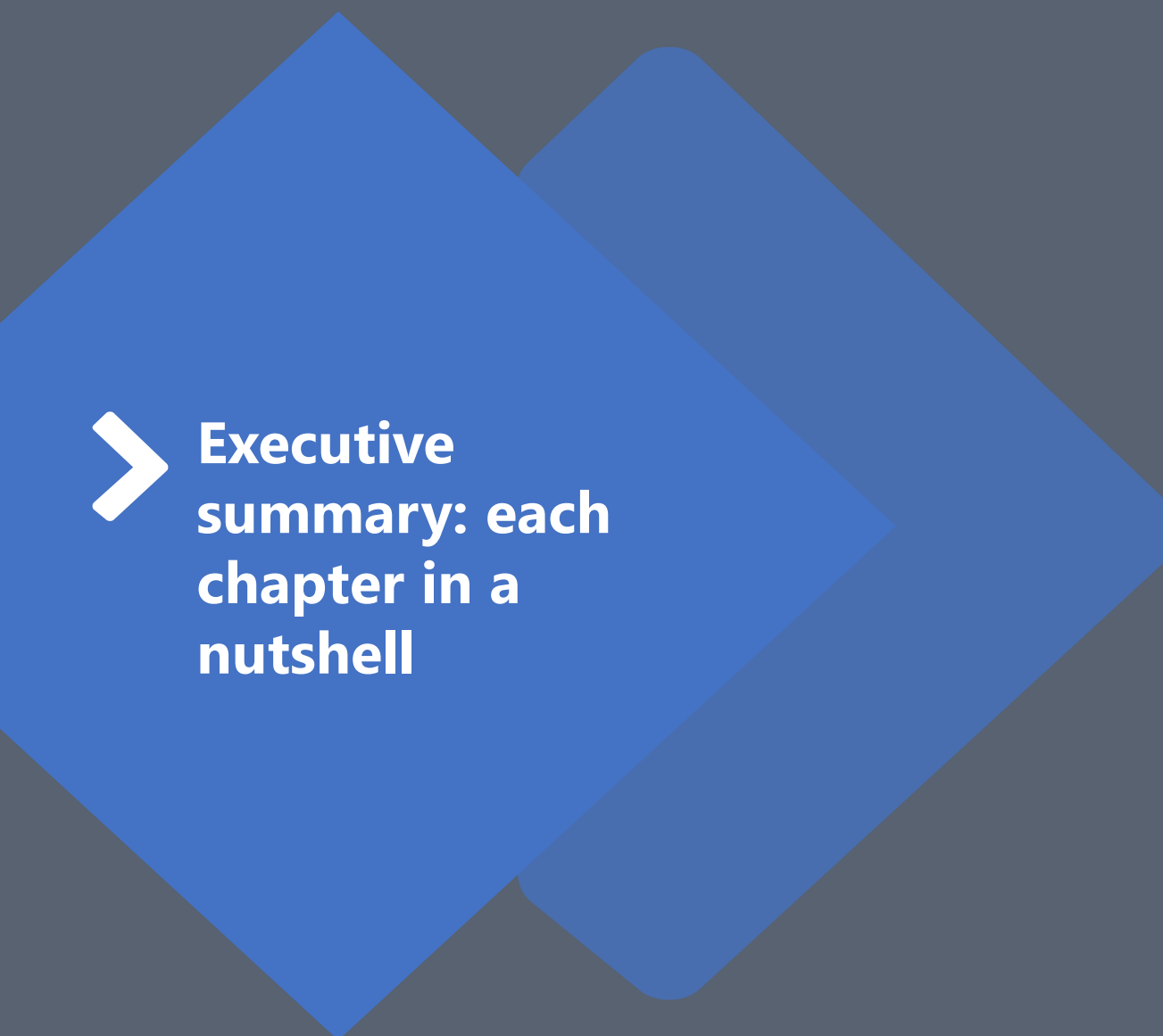
**The 4 key Fear  
Management  
Strategies  
(and related  
brand roles)**



**What will  
happen in the  
future?**



**Owning the  
future: strategic  
implications for  
brands**



**> Executive  
summary: each  
chapter in a  
nutshell**



# 1. The current situation around the world

- > The 'management of fear' has become the center of reality, heavily affecting **3 key life dimensions** such as:
  - TIME
  - SPACE
  - PERSONAL IDENTITY
- > The changes across each of these 3 dimensions have interesting implications for brands
- > These are also affected by cultural and social differences between Countries: 'I' and 'We'- Countries, trust in the government, social divide, access to a NHS and previous epidemic experience



## 2. The 4 Fear Management Strategies

- > There are 4 key Fear Management Strategies, depicted by Archetypes
- > For each archetype there is a corresponding brand role, with interesting examples from around the world: the brand can be:
  - A CAREGIVER (for people who feel like INNOCENT VICTIMS)
  - AN ENTERTAINER (for people who feel like JESTERS)
  - A HERO (for people who feel like WARRIORS)
  - A FACILITATOR (for people who feel like THE COMMON MAN)
- > Beyond today: there is a 5th Archetype that will emerge in the near future, the CREATOR, for whom the brand can be A SPRINGBOARD



## 3. What will happen in the future?

- > Analyzing the last 3 key pandemics in history, there are usually 3 main phases:
  - COLLECTIVE/INDIVIDUAL DENIAL
  - RECOGNITION
  - THE FIGHT BACK
- > The 5 Archetypes and related brand roles evolve and “fit” each stage differently, with a deep dive into the current evolution: role of (social) media
- > What we can expect from tomorrow is a “new normality” (no going back to what was before)





## 4. Strategic implications for brands

- > There are 7 key areas for brand actions: for your brand, consider a relevant role to own, today and tomorrow.
- > For each area, we offer a deep dive into concrete actions and strategic insights to make brands future proof in a heavily shifted reality
- > “PURPOSE” is our key final area for consideration to build brand equity: from storytelling to storymaking,



HEALTH & SAFETY



SUSTAINABLE  
CONSCIENCE



DIGITALIZATION



LOCAL &  
NEIGHBORLY



THE CONSIDERED  
CONSUMER



COMMUNITY  
& SOLIDARITY



SPRINGING  
BACK TO LIFE



# **1** The current situation around the world



# The current situation around the world

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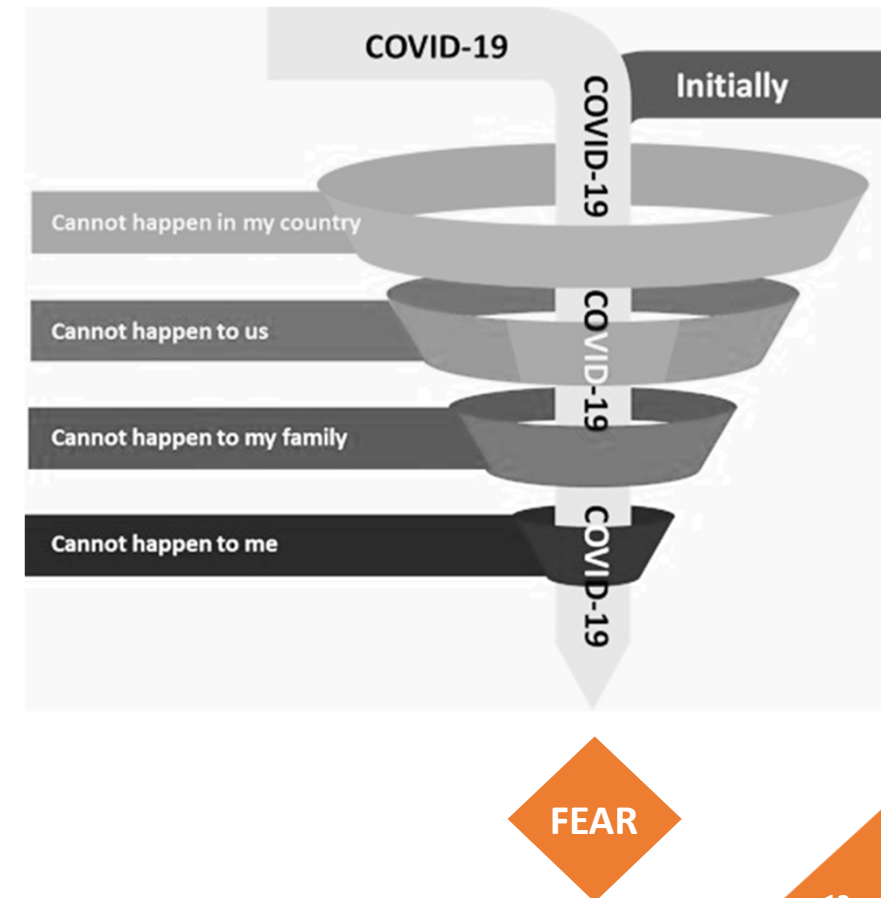
## From recognition and acknowledgement ... ... to the management of Fear

**The current emergency context has injected Fear into people;** an unusual sentiment for the majority of Countries (with the exception of Brazil and India).

Fear for their personal and family's health, as well as for the state of the current economy and what it could look like in the future. Fear of the unknown: nobody knows what's going to happen in the future.

The obligation to stay at home and/or the avoidance of physical contact, have further reinforced that feeling of Fear, redefining all the dimensions of individual and social life, especially:

- > Time
- > Space
- > Personal identity



# What is TIME after the Coronavirus

## Before

We were used to acceleration, immediacy. Particularly those with high discretionary income, could have anything desired or needed instantly. There was a subconscious assumption that this would be enduring.

## After

Fear of the future reduces our focus on tomorrow, as we put to one side our future dreams and plans.

The daily routine becomes unlike anything we have ever experienced before.

Boredom cohabits with Fear.

People need to fill the void with new activities and interests: doing at home what was previously done outside, rediscovering activities long forgotten and rekindling old pastimes and hobbies.

On the other hand we are too busy: no distinction between work and personal life, week and weekend days, and no possible delegation.



- > Rise of "how to" related web searches: tutorials on pretty much anything as a means of bringing things under control.
- > Recovery of slow activities (e.g. painting, cooking, learning a foreign language).
- > Huge increase in OTT subscriptions, Netflix in particular.

# TIME: key implications for brands

## A “more intense and focused approach” to branding principles:

- > Increased focus on the emotional side of human beings, esp. in Communications Tone Of Voice (e.g. Italian Parmigiano Reggiano advertising)
- > Time to promote brand culture within employees at all levels, empowering remote relationships
- > Slow digital stories:
  - Serial cross platform storytelling
  - Slow (long) stories
  - Web documentaries (heritage storytelling)
  - Enabling and integrating crowd-sourced content into corporate storytelling
- > Everyday companionship
  - Daily micro stories

## Educating/helping customers in perfecting work-life balance

- > E.g. differentiating communications, interactions, offers and promotions between weekdays/weekends



# What is SPACE after the Coronavirus

## Before

There was an easily accessible world. With the exception of the most marginalized, we were used to choosing how close we wanted to get to other people, with a clear separation between the 'me' and the 'we' spaces.

## After

We are primarily confined to our houses or apartments.

Inside 'Space management' has become crucial, in order to:

- > bring activities indoors
- > find space indoors that is away from others; building boundaries
- > harmonize family and personal spaces, with less privacy
- > distinguish between work and private life spaces

There are no clear boundaries between stage and backstage: spaces need to be reinvented

Our home becomes not just the center of the world but the only possible world



- > *VIPs' homes become the public stage for a concert, a speech, a comedy, to be viewed on social networks*
- > *Huge increase in online shopping*
- > *Trying to replicate at home what was done out of home*

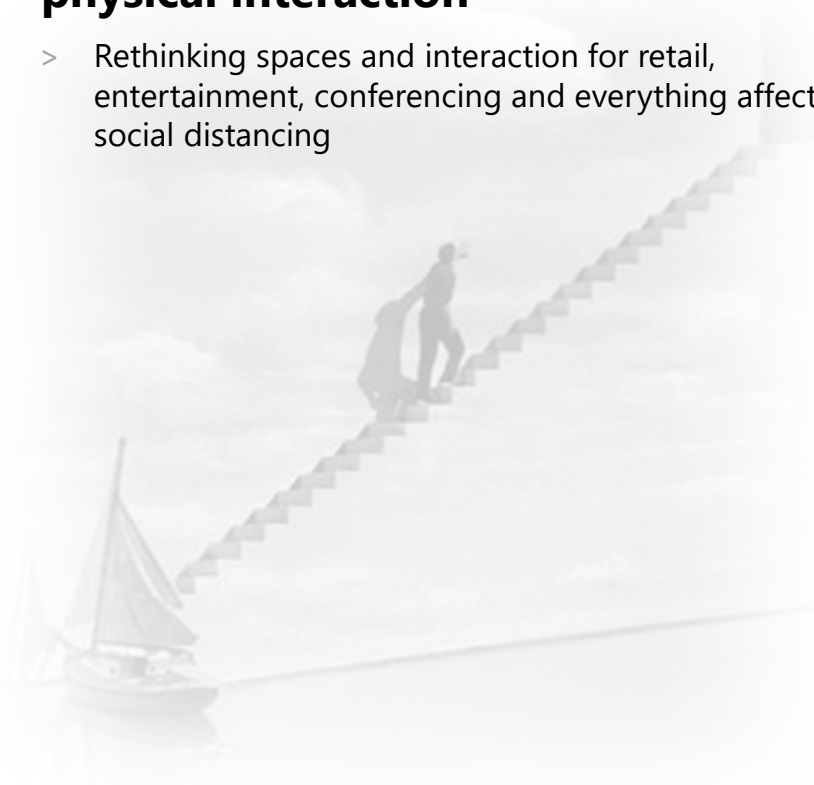
# SPACE: key implications for brands

## Home as a new doorway to the world

- > Turning the home into a place to access all kinds of experiences (e.g. Lonely Planet's 'mock' guide to Home exploration)
  - Products and services specifically designed to enhance the home environment, making it more exciting
  - Virtual access (e.g. museums making their entire collections accessible from home, even with video guide 'tips' from the staff, recorded at home)
- > Implementing smooth digital interactions with customers, from content fruition to purchase journeys (also for durables)
- > Home delivery
- > Contactless delivery and payments (see Domino's several 'cutting edge' digital innovations)

## Social distancing as a new standard for physical interaction

- > Rethinking spaces and interaction for retail, entertainment, conferencing and everything affected by social distancing





# What is PERSONAL IDENTITY after the Coronavirus

## Home as a new doorway to the world

- > Our personal identity is built based on our interaction with other people. The recent social distancing measures have redefined how we maintain our personal and collective social identity: who we are, how we look, our need for community and relationships
- > Creating a new social identity is now the focus of our efforts: SMS, instant messaging and social media, trying to establish and reinforce as much as possible a perception of connectedness and community, even if distant and digital
- > The family (in a broad sense) and community play a key role
- > Identity and relationships are put to the test: getting to know people for who they really are
- > No more separation between one's private and public image: the private image is beginning to prevail with a hybrid identity being built. More of people's personal lives are being presented to the outside world than before, to groups who have not seen them



- > *Sharing of more private identities is becoming more prevalent and in fact unavoidable*
- > *Search for activities that the whole family can do together, including by remote video call*

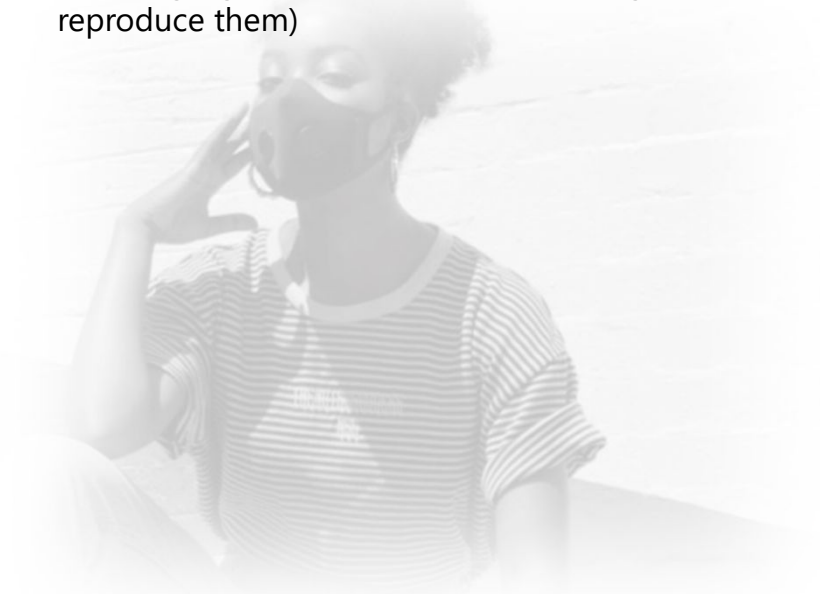
# PERSONAL IDENTITY: key implications for brands

## Connecting, strengthening, filling the 'tribe' void

- > Providing content that helps people cope with relationship voids
  - E.g. for broadcasters, showing repeats of well-loved shows, or creating 'curated' libraries that enhance connections (e.g. cartoon nights for the whole family, repeating favorite talent shows for consumers to reminisce over, sporting greatest hits etc.)
- > Endorsing community-driven activities to stay in touch with those who share the same interests
  - (e.g. in Italy Dissapore, a food blog, launching a contest about sharing home-made pizza pics and recipes' secrets, etc.)
- > Allowing escapism and a sense of "normality" through consistency in *communication*
  - (e.g. Suitsupply or John Enric continuing their editorial routine about the release of new suits, only with a light humorous twist)

## Transparency

- > Showing the real people behind brands and companies
  - (e.g. Suitsupply making 'hero' videoclips of store managers around the globe; Massimo Bottura cooking every night from his kitchen with his family, with no filters or production hacks; Exit – a bistro in Milan – unveiling signature dishes recipes, inviting users to reproduce them)





# Variables such as the sense of community play a key role in modulating the reactions to the 3 dimensions...

## "I" Countries

Countries where the personal dimension is key, where the ideas of collective and solidarity are limited to the "1st degree of separation"

**For example:**  
Italy, USA



## "We" Countries

Countries where the collective dimension is very strong, where relevance goes beyond the self, family and friends and embraces a fully 'social' dimension

**For example:**  
China, India

### TIME

*The perception of time is dictated by personal situation and urgency*

*Perception of time is collectively shared and discussed in a more articulated (and slower) 'bigger picture'*

### SPACE

*Social distance and quarantined spaces are tools to rebuild a self centric, individual narrative*

*Social distance and personal space are constantly shared with the collective in a hyper connected "bigger picture"*

### PERSONAL IDENTITY

*Personal thoughts and concerns, at the most, shared with closest friends and families*

*Socially-driven thoughts and concerns, where implications for the collective are sometimes prioritized over personal relevance*



**As well as a sense of community, there are 4 other influencing factors: in general the more they are present, the easier the management of fear**

less...



...more

**TRUST IN THE GOVERNMENT**



**SOCIAL HOMOGENEITY**



**COMMON RELIABLE NATIONAL HEALTH SYSTEM**



**PREVIOUS EXPERIENCE WITH EPIDEMICS**

*Every Country, but...*



*...China and neighbors (Singapore, Thailand)*



# **2** The Fear Management Strategies (and related brand roles)



# The 4 Fear Management Strategies

- > There are 4 key Fear Management Strategies, each represented by an Archetype
- > For each archetype there is a corresponding brand role, with interesting examples from around the world: the brand can be:
  - A CAREGIVER (for people who feel like INNOCENT VICTIMS)
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# There are 4 Fear Management Strategies, each represented by an ARCHETYPE





**A** **Recognition and ESCAPE:**  
*the INNOCENT VICTIM's*  
*need for protection*





# Recognition and ESCAPE: the INNOCENT VICTIM's need for protection

**A** **Passive, giving up, accepting other people's decision**

**Lack of orientation and action**

1. The Innocent Victim is in pain as they feel they miss something, and have had an unfair scenario placed upon them, over which they had no control
2. 'Survival' attitudes
3. They feel lonely and (momentarily) paralyzed: almost frozen, unable to process the new normal, uncertain and unsure
4. The enemy is unseen and hard to face directly
5. 'Once upon a time' nostalgia and past memories become an important refuge

# Recognition and ESCAPE: the INNOCENT VICTIM's need for protection

## **A** The brand is a CAREGIVER



### **Provides comfort in a time of need**

- > TECH: Vodafone guarantees one month unlimited and free internet access for students between 14 and 26 y.o.

### **Protects the victim from everything and everybody**

- > FOOD: Italy Eat Food offers free entry into the sales platform to food and wine producers

### **Encourages**

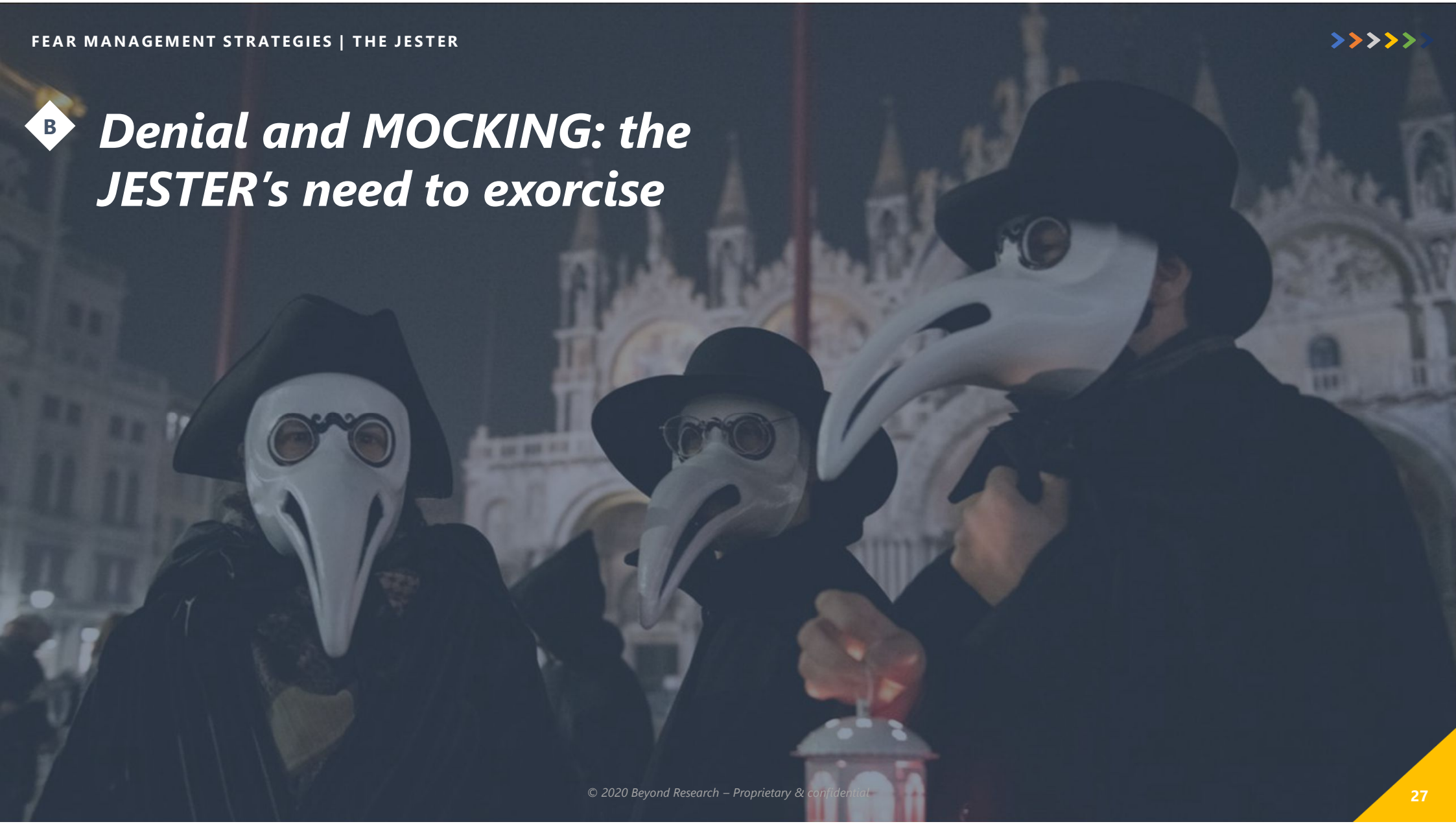
- > MEDICAL: PagineMediche.it guarantees free access to the Guidelines of the Ministry of Health chatbot

### **Evokes a return to normality**

- > AUTOMOTIVE: Nissan Middle East MD made a note to all Nissan Customers to stay off the road with a promise that the roads miss them too



**B** *Denial and MOCKING: the  
JESTER's need to exorcise*





# Denial and MOCKING: the JESTER's need to exorcise

B

## **Making light of the situation**

**Escape towards dimensions that bypass common sense**

1. Living in the moment
  - > Fatalism: there's nothing that can be done
  - > Humanization: we may as well laugh at the situation and get through it together
2. Comedy as a refuge
3. Playfulness as a mandatory attitude

# Denial and MOCKING: the JESTER's need to exorcise

**B** **The brand is a  
ENTERTAINER**



## Makes life lighter

- > HOME STAPLES: Who Gives A Crap toilet paper – Shared humorous anecdotes of customers ordering too much toilet paper as supermarkets shelves were empty.

## Tells positive stories

- > ENTERTAINMENT: Smart Tales offers free access to interactive children's books to tell them a different story from the one they are expecting

## Gives people a good laugh

- > PERSONAL CARE: Bath and Body Works Arabia has been building relevance by communicating messages to gladden the heart of their customers

## Puts people center stage, to hear their voice

- > FOOD: Old pack of Mulino Bianco becomes a meme, playing on products' names 'in the time of social distancing'.





**◆ Denial and CHALLENGE: the WARRIOR's need for an enemy**





# Denial and CHALLENGE: the WARRIOR's need for an enemy

## **C** Counterculture: polemic, exasperated conflict

1. Emphatic criticism of others' behavior in the crisis, with a need to be clearly heard and have influence. Strong views around coronavirus action
2. Conflict between sides, e.g.
  - > Young against Old, in how to face the situation
  - > Outrage against Indifferents, who many feel should shoulder the blame
  - > Liberals against Conservatives in USA

## Denial and CHALLENGE: the WARRIOR's need for an enemy

### **C** The brand is a HERO



#### **Helps to manage the frustration and anger**

- > TECH: Amazon is actively working to eliminate any profiteering/price gouging

#### **Guides the search for a meaning**

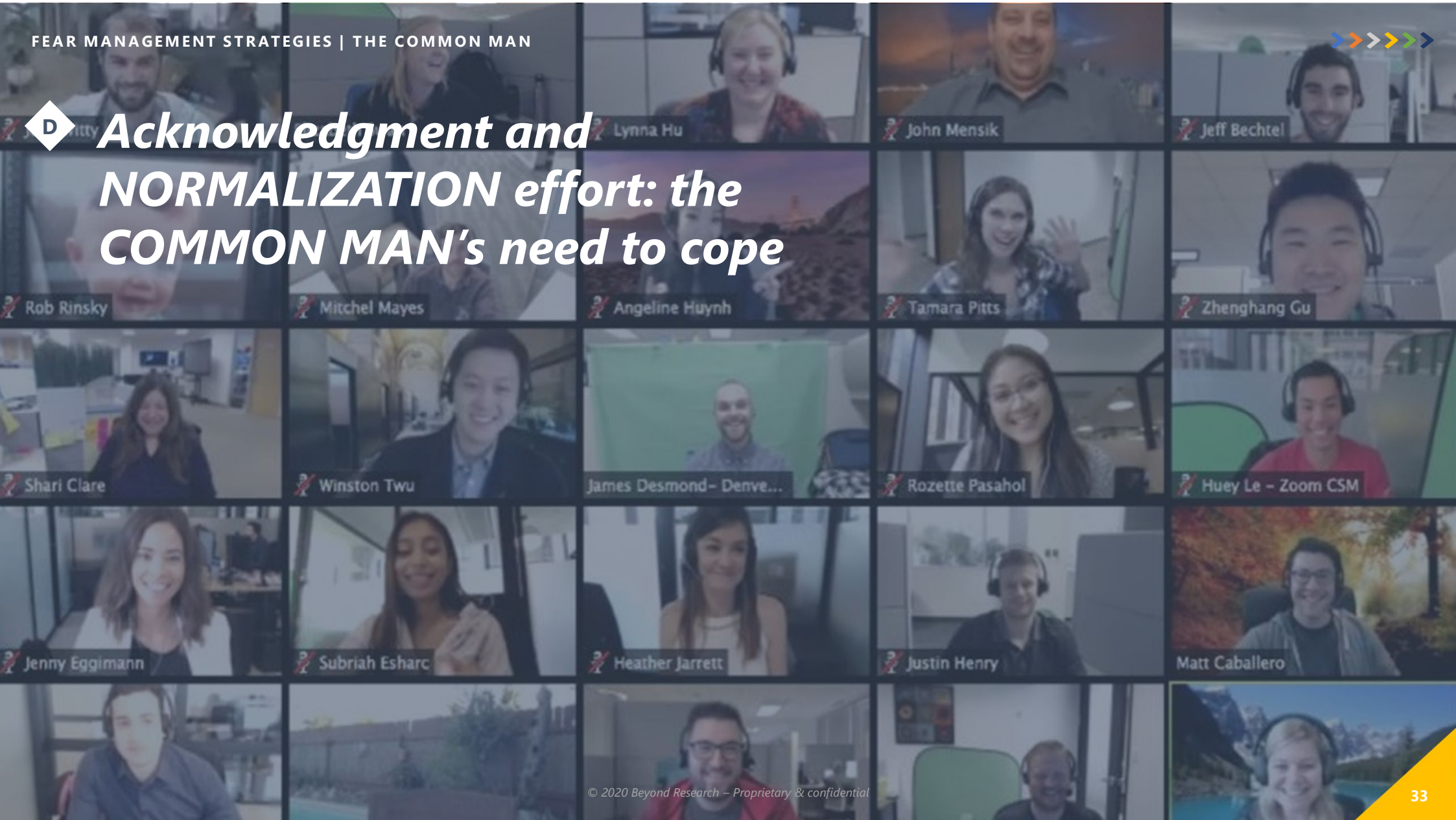
- > BEAUTY: in Australia Apple, Michael Hill and Lush shut their retail doors ahead of the government lockdowns

#### **Identifies new heroes and symbols of hope**

- > FASHION: Chiara Ferragni, associated with The Blonde Salad, via her personal Instagram profile, gives voice to professional figures in the medical field



**D** *Acknowledgment and NORMALIZATION effort: the COMMON MAN's need to cope*





# Acknowledgment and NORMALIZATION effort: the COMMON MAN's need to cope

**D** **Greater appreciation of the simple things**

**Traditions, recovery of nature and the past are key**

**Search for 'everyday heroes'**

1. A greater appreciation of the simple and smaller things in life (time, relationships, freedom etc.). Not taking them for granted and valuing the imperfections in these things.
2. An effort to bring order to chaos
3. Everyday habits and activities an important way to normalize the abnormal

# Acknowledgment and NORMALIZATION effort: the COMMON MAN's need to cope

## **D** The brand is a FACILITATOR



### **Finds the positive side**

- > PERSONAL CARE: In India Lifebuoy is promoting good hygiene in the culture

### **“Lowers” the social temperature**

- > TECH: Alibaba is organizing no-meeting concerts

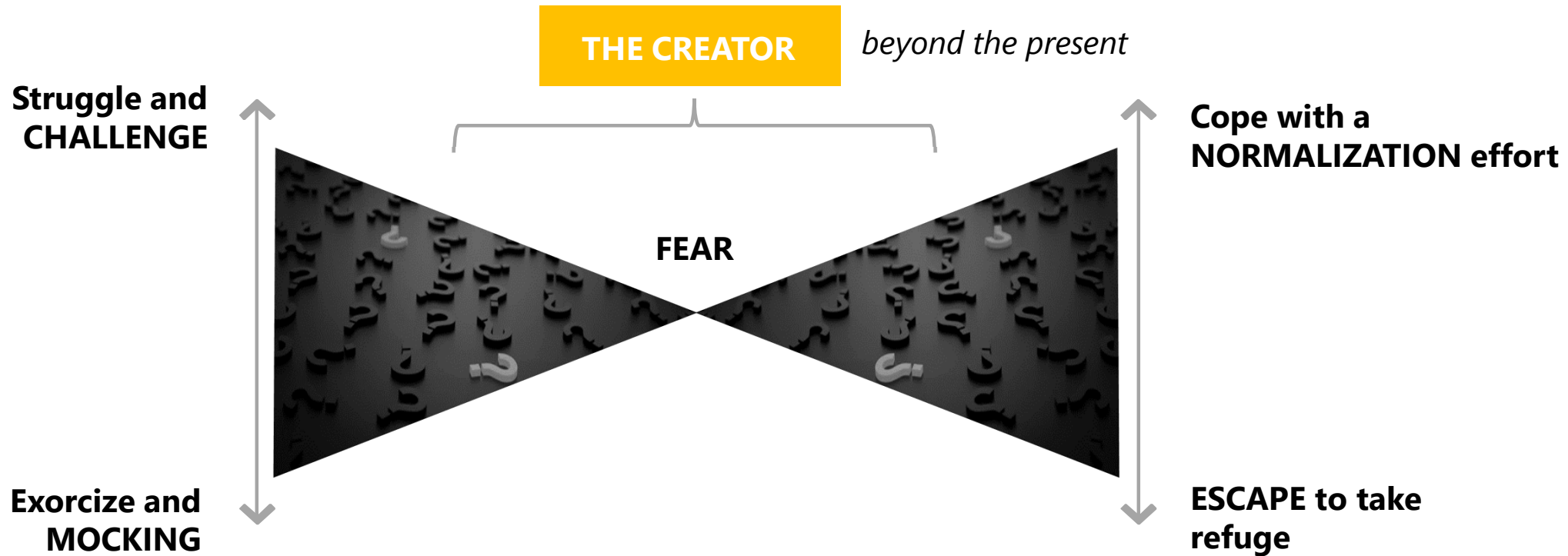
### **Offers new ways to do all the things we did before “in a different way”**

- > SPORTS/ENTERTAINMENT: DL Gym and Virgin Active promote free training at home

### **Leverages rituals and traditions**

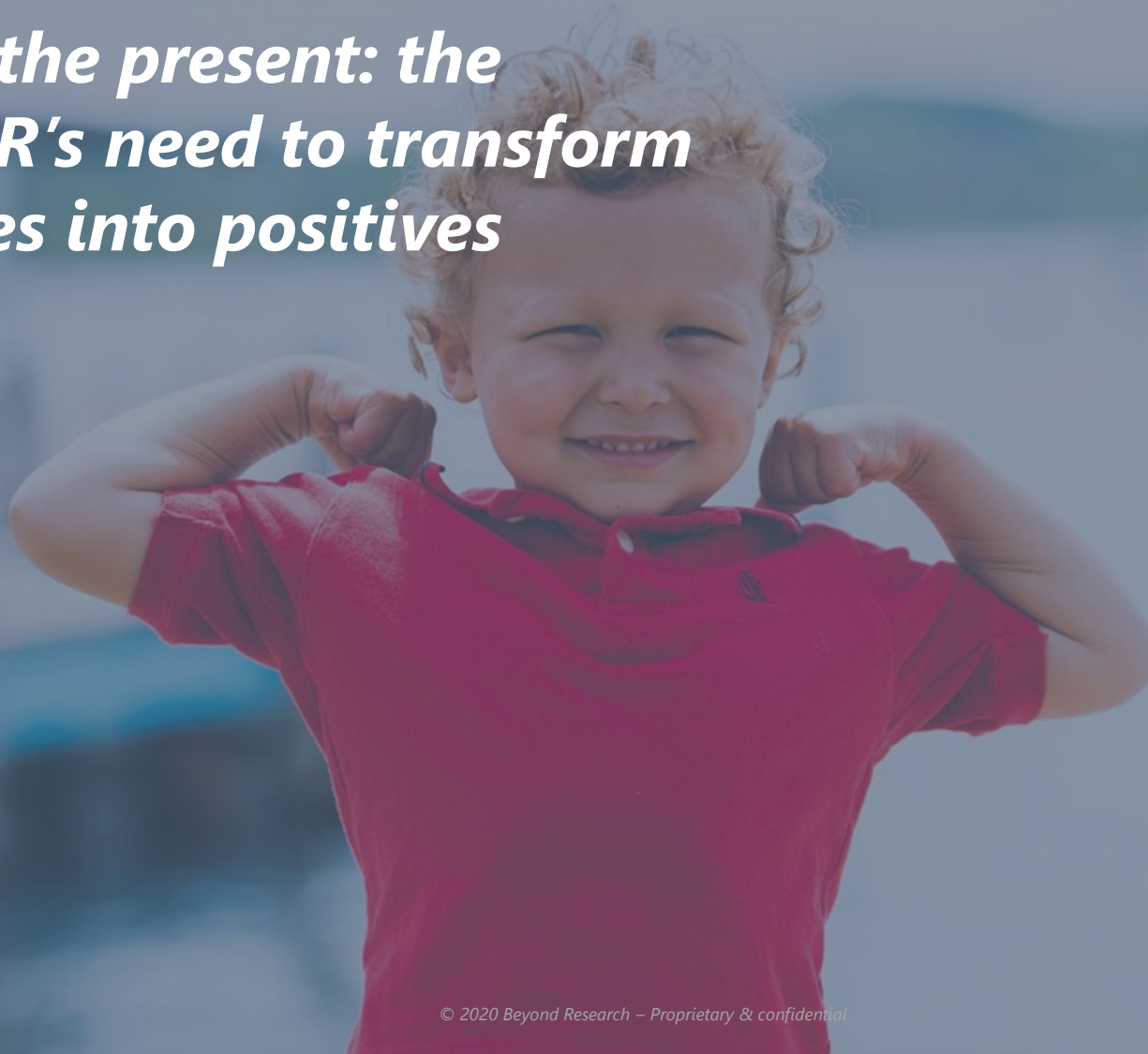
- > EDUCATION: Abu Dhabi and other Universities and schools across the UAE offered that they will continue to teach everyone remotely while residents were welcome at the campus.

# A fifth archetype is also possible: the Creator invents new paradigms that will drive our lives in the future





***Beyond the present: the  
CREATOR's need to transform  
negatives into positives***





# Beyond the present: the CREATOR's need to transform negatives into positives

**An opportunity to identify new rules**

1. Entrepreneurial values and attitudes at the core of everything

2. Confidence about one's past experience and skills

3. Trust in others both personally and at work

4. Opportunities to leverage the past in new ways

5. Opportunity to use this crisis to create new values, ways of doing things and company/brand direction

**Reinvention/  
resilience**

**A tension towards  
what will be 'after', in  
the future**

# Beyond the present: the CREATOR's need to transform negatives into positives

## The brand is a **SPRINGBOARD**

### **Finds the positive side**

- > TECH: Stocard, an e-wallet, sends various notifications with updates to its members

### **Transforms reality into an opportunity for the future**

- > ENTERTAINMENT AND CULTURE: most famous museums in Italy (and also around the world, as the pandemic spreads) such as Uffizi and Musei Vaticani started for the first time a free virtual representation of the inside, promoting a multiple cross-over opportunity





# 4 factors have an influence on the relevance of the Archetypes:

*the more they are present, the fewer Innocent Victims and Warriors, the more Common Men*

less...

## TRUST IN THE GOVERNMENT

...more



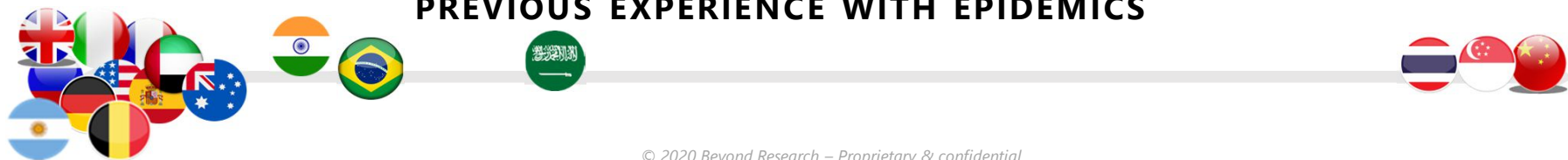
## SOCIAL HOMOGENEITY



## COMMON RELIABLE NATIONAL HEALTH SYSTEM



## PREVIOUS EXPERIENCE WITH EPIDEMICS







# 3 What's will happen in the future?



# The analysis of pandemics in history can provide a precious perspective on the strategies' evolution and what's will happen in the future



## 1918 'Spanish Flu'

the "mother of all pandemics", one of the deadliest events in human history

(between 50 and 100 million deaths, according to Paolo Mieli)



## 1957 'Asian Flu'

one of the main episodes of Asian influenza in the 20th century along with the 1968 Hong Kong flu

(2 million deaths, OMS estimate)



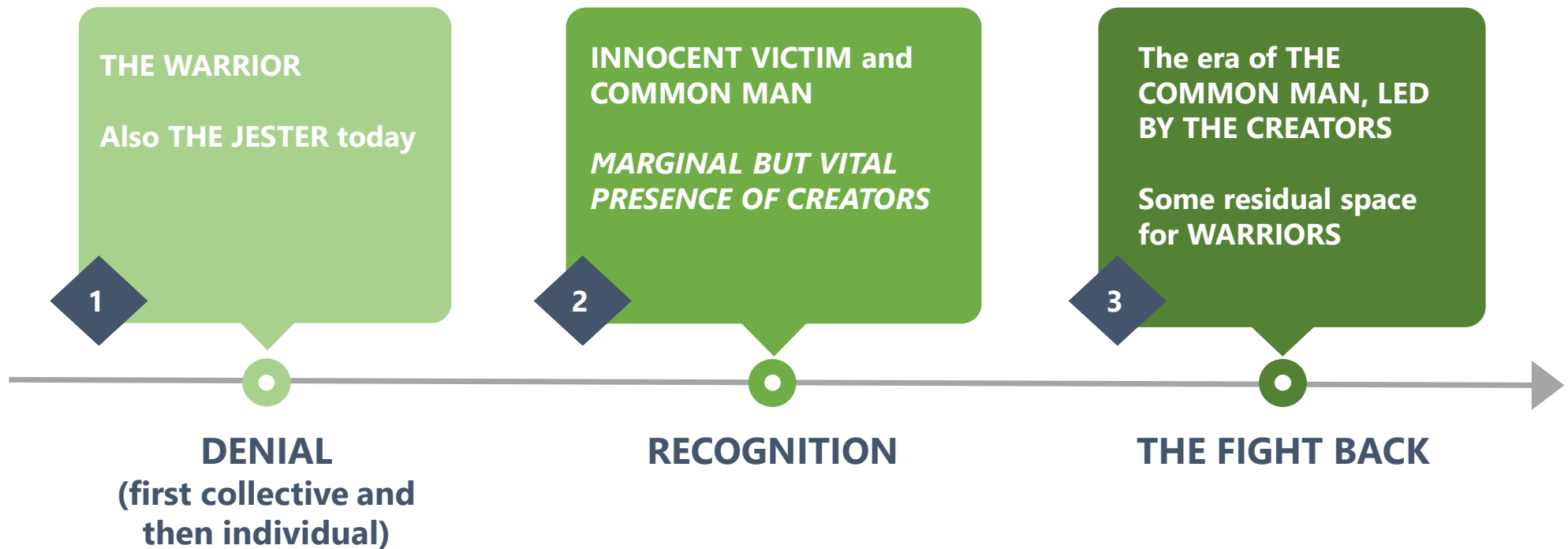
## 2003 SARS

Not as deadly, but the most significant epidemic caused by a coronavirus before 2019

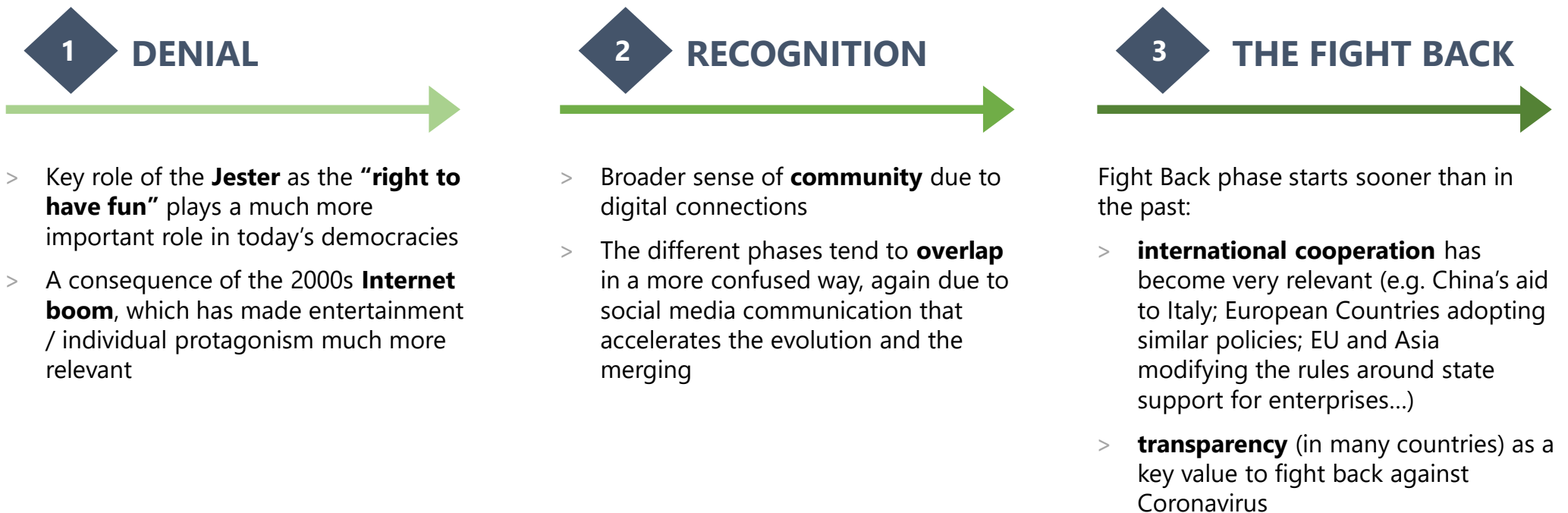
(774 deaths out of 8096 contagions)



# The history of these 3 epidemics highlights different phases that are not always clearly separated but tend to recur



# In the evolution of today's Coronavirus we can identify the very same phases, with some interesting differences due to the influence of the Internet/social media



# After such a big event, there's no going back... A NEW NORMALITY

**A new mindset will emerge: 'back to basics' will be increasingly blended with the comfort of technology**

**The fall in sales of ginger, goji, turmeric and the rise of flour show the need of Italians to focus on what is somehow concrete, tangible, 'hands on'...**

**At the same time, social media / digital life has become a way to go deeper into what we share**

- > *Towards a new, normality that's more than just a combination of basic, physical and digital*
- > *The need to establish deeper, more authentic connections, no matter the "degrees of separation"*
- > *When sharing is so pervasive, inspiring is not enough any more*



**4** **“Owning the future”:  
strategic  
implication  
areas for  
brands**



## Firstly, you should decide ...

What archetype aligns best with your brand and what role should you play in the future?

Are you a ...

- > **Caregiver**
- > **Entertainer**
- > **Hero**
- > **Facilitator**

Or

- > **Springboard**

> *Consider the following pages with the best alignment for your brand in mind*

TOMORROW

# The key areas for brands:

consider a relevant role to “own”, today and tomorrow



**HEALTH & SAFETY**



**SUSTAINABLE  
CONSCIENCE**



**DIGITALIZATION**



**LOCAL &  
NEIGHBORLY**



**THE CONSIDERED  
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**COMMUNITY  
& SOLIDARITY**



**SPRINGING  
BACK TO LIFE**



# Health & Safety

**The pandemic has made personal health the no. 1 priority worldwide, affecting people's everyday habits and companies' protocols.**





# Health & Safety



## Increased health awareness and meaning

- > General relevance of health-related claims
- > Holistic concept of health

## All-sanitized

- > Germ-killing protocols
- > Protected environment
- > Preference for digital/remote payment methods
- > Changed retail experience
- > The challenge of sustainable packaging

## Virtual caregiving

- > On demand and tech solutions
- > Automatic testing
- > Virtual or tech-connected caregivers

# Sustainable Conscience

**A global, empowered conscience (now and forever) is making sustainability a mandatory requirement for Companies.**

**Brands' "conscience value" (rather than "conspicuous value") at every level, from supply chain to work policies**



# Sustainable Conscience



## A sustainability wake-up call

- > New meaning for concepts like Natural, Balance, Authenticity

## Ethical Practices

- > From safe work policies, to provision of social benefits for the work force, to broader ethical concepts (e.g. not using child labor)

# Digitalization

**Digital life will become an even more fundamental way to live and communicate.**

**Social media offer greater and deeper opportunities for brands to play a relevant role for people.**

**Digital natives, Gen Z, will expect their whole life to be “digitally empowered” and be able to forge their own digital experience.**

**A new awakening among “older” profiles to become “net savvier”.**



# Digitalization



## “E-life”

- > Home as the new doorway to the world

## Curated experiences

- > Towards a more sophisticated approach to digital UX design, for increasingly personalized experiences and interactions

## Tech-empowered education and time

- > For adults: Remote culture, facilitate WFH new rituals
- > For kids: Responsive and companion-like devices, help reduce time spent online

## Local & Neighborly

**The 'unknown' has caused a lot of pain; people will demonstrate a need to increase control over everything they do**

**What is local, close, familiar, can convey value and control, but also stand for agility and quickness in terms of the supply chain.**



# Local & Neighborly



## “Local love”

- > Growth of local-oriented businesses and brands
- > Revenge of small boutiques
- > Rise of normal, everyday brands

## Agile supply chains and logistics

- > With key implications not only for distribution, but also for brand & communication and product



# The Considered Consumer

**People's spending power will shrink dramatically.**

**There will be some 'revenge spending', but if consumers feel there is little control over the virus as it evolves, their spending strategies will be more cautious: convenience and true quality are going to be key.**



# The Considered Consumer



## Revenge spending consciousness

- > Concise, reliable communication
- > An 'entry point' offer
- > New pricing models

## Basics that truly matter

- > A simpler, more authentic way of living

# Community & Solidarity

**During the pandemic, “community feeling” is a key way to cope with fear and loneliness, and solidarity has become a key caregiving attitude.**

**The global system will reset around a bigger “we thinking” paradigm, with a key role for brands and their commitment in society**



# Community & Solidarity



## Enabling connections

- > Help people to further support their sense of community

## Generosity and fairness

- > A new wave of solidarity is trending in an era where social good and fairness are more discussed than ever
- > Brands are expected to be key supporters in many different ways, across all touch points

## Ethical “we thinking”



# Springing Back to Life

**After the limitations and constraints of the pandemic, people will 'spring back to life', embracing whatever may be able to bring even the smallest pleasure (from a snack to attending an event)**





# Springing Back to Life



## Branded relief

- > Implement altruistic initiatives to revitalize communities and entire markets

## Offer a “free” smile

- > Pursue an Entertainer role, esp. if consistent with your DNA
- > Embrace TV, radio and digital platforms ... even direct mail...people are hungry for relevant messages and communication

## Nostalgia-fueled revenge indulgence

- > Re-create the fullness of the ‘good old days’ narrative

## Last but not least, a key aspect to build brand equity: **PURPOSE**

**Coming out of a phase of economic and social crisis, brands will have a key responsibility to clarify their messages, values and stories, to pursue a new level of authenticity, but also own a role in guidance and understanding.**

**From storytelling to storymaking, helping the collective to rebuild a social and cultural narrative**



# Purpose



## What do you stand for?

- > Identify what are brands' foundation values and deliver them to your consumers

## Storymaking

- > Brands expected to have a proactive and responsible role: not just *storytelling*, but *storymaking*, co-creating the world's narrative along with customers
- > Act with leadership, taking bold decisions



FINALLY IN SUMMARY...

Identify consistent and distinctive actions  
that can make YOUR BRAND THE

*unforgettable,  
generous, brave,  
relevant creator*

IN THIS TIME OF NEED

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