

# EUROPE & THE COVID-19 OUTBREAK

11TH JUNE 2020

ELLE  
INTERNATIONAL

Lagardère  
global advertising



# WHO WE ARE, IN A NUTSHELL

A 360° INTERNATIONAL & POWERFUL MULTIMEDIA OFFER



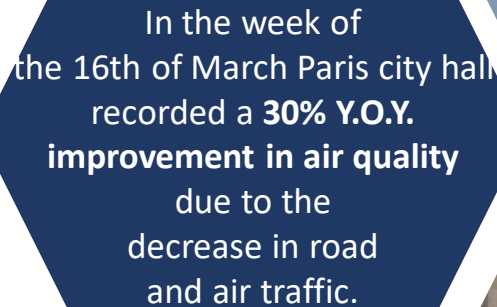
PRINT | DIGITAL | MOBILE & TABLET | RADIO

55

Number of days  
France was in total  
lockdown for:

55

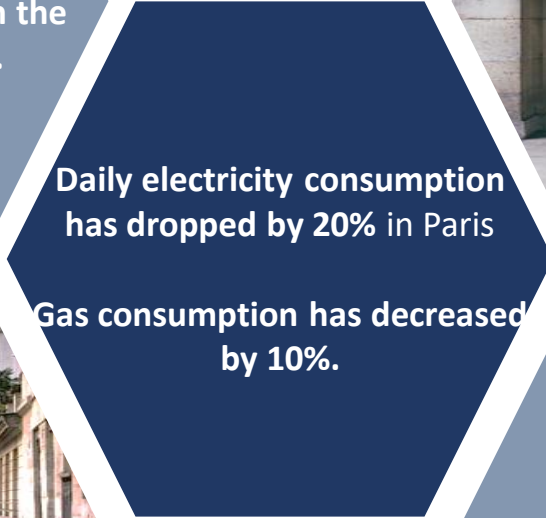
# WHAT A LOCKDOWN IN PARIS MEANT




In the week of the 16th of March Paris city hall recorded a **30% Y.O.Y. improvement in air quality** due to the decrease in road and air traffic.




Water consumption has dropped about **20%** compared with the same period last year.



Daily electricity consumption has dropped by **20%** in Paris  
Gas consumption has decreased by **10%**.



The tonnage of waste, fell by almost **40%** on 29th March, compared to 13th March (*before confinement*).



Noise emissions generated by road traffic fell by **80%** after one week of lockdown, with this level reaching **90%** at night.

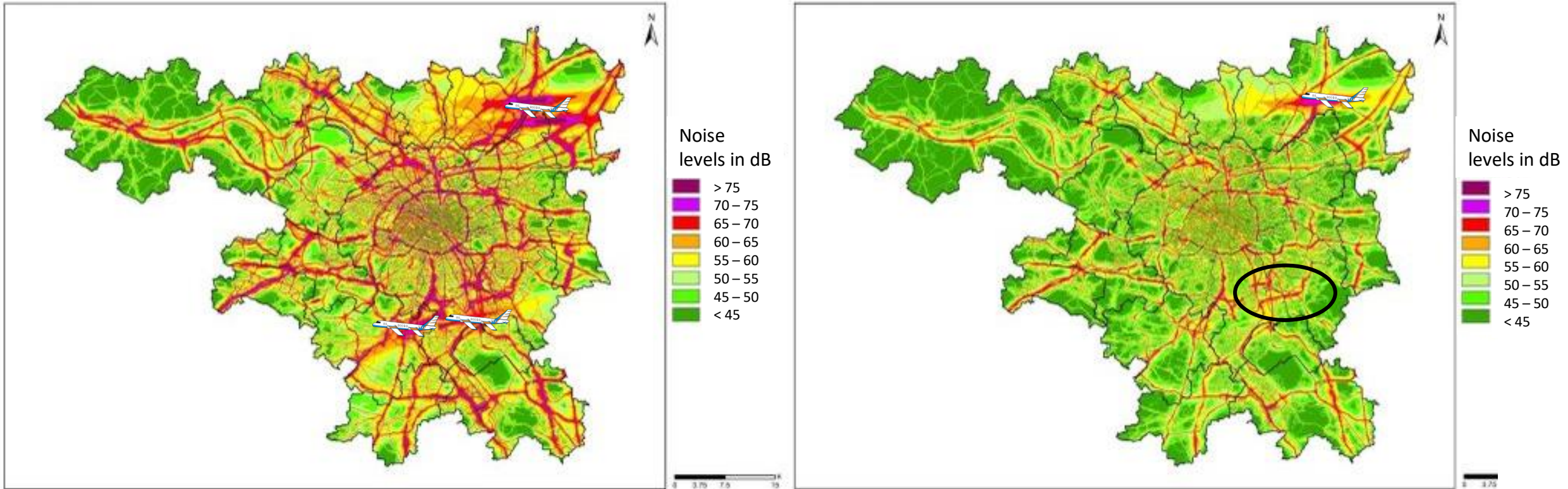


SOURCE: PARIS.FR



# THE SOUND OF SILENCE

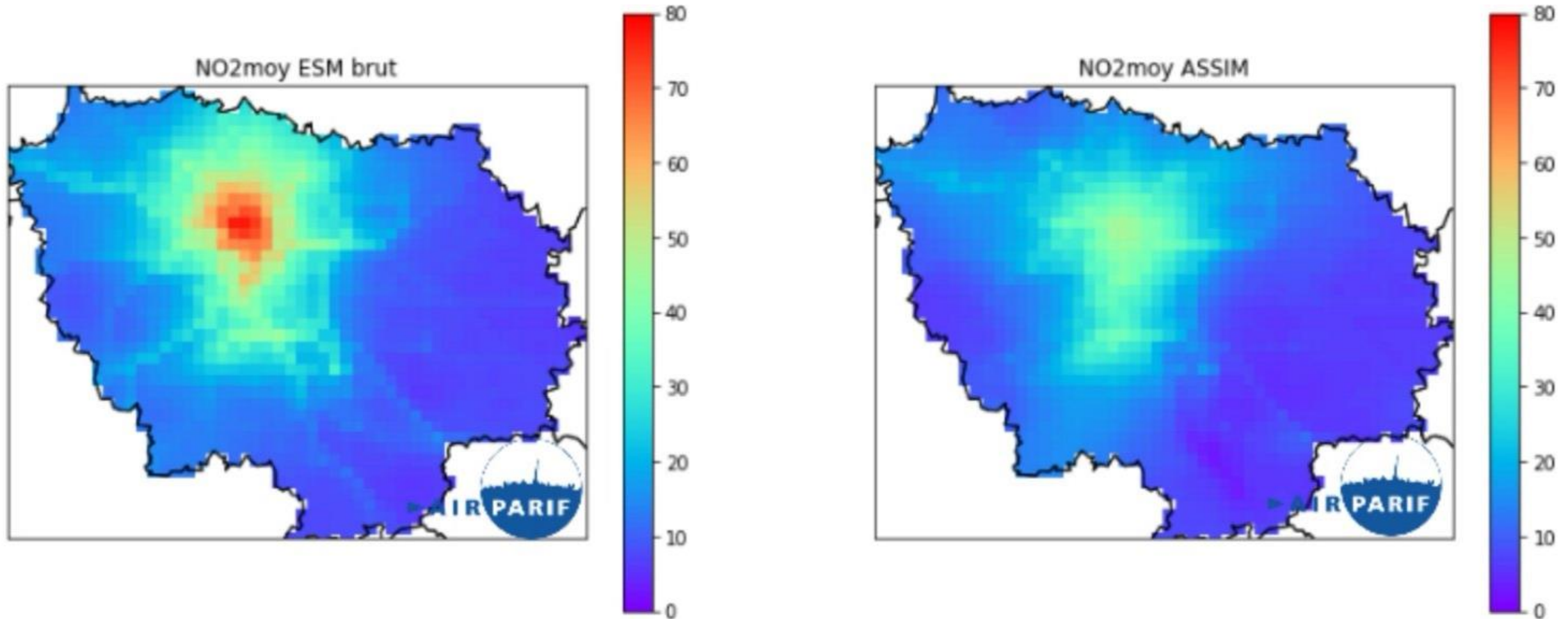
Graph showing the measure of **noise pollution before and after lockdown** in the Paris region:



SOURCE: BRUITPARIF, 26TH MARCH 2020

# SOME GOOD NEWS FINALLY

Graph showing the measure of **pollution before and after lockdown** in the Paris region:



# COVID-19 IN FRANCE

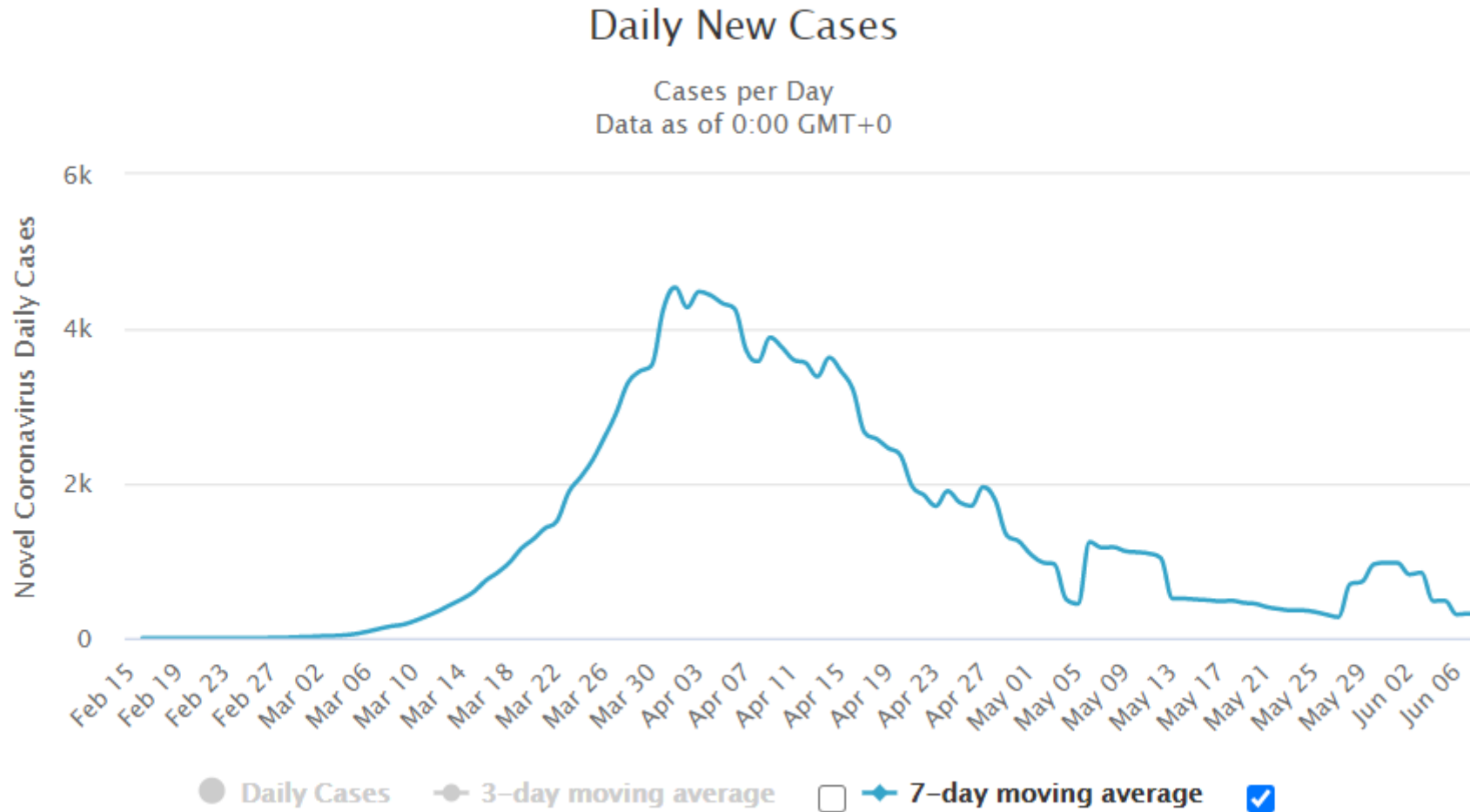


- 24TH JANUARY** The first case of COVID-19 recorded in Europe and France
- 12TH MARCH** School and university closures announced for 16th March
- 13TH MARCH** Gatherings of over 100 people banned
- 14TH MARCH** All non-essential public places ordered to close as of midnight
- 16TH MARCH** **Mandatory home confinement beginning 17th March announced**
- 11TH MAY** A range of lockdown measures eased throughout the country

SOURCE: SANTE PUBLIQUE FRANCE FIGURES, 8TH JUNE 2020



# A FLATTENED CURVE



SOURCE: SANTE PUBLIQUE FRANCE FIGURES, 3RD JUNE 2020

# COVID-19 IN EUROPE

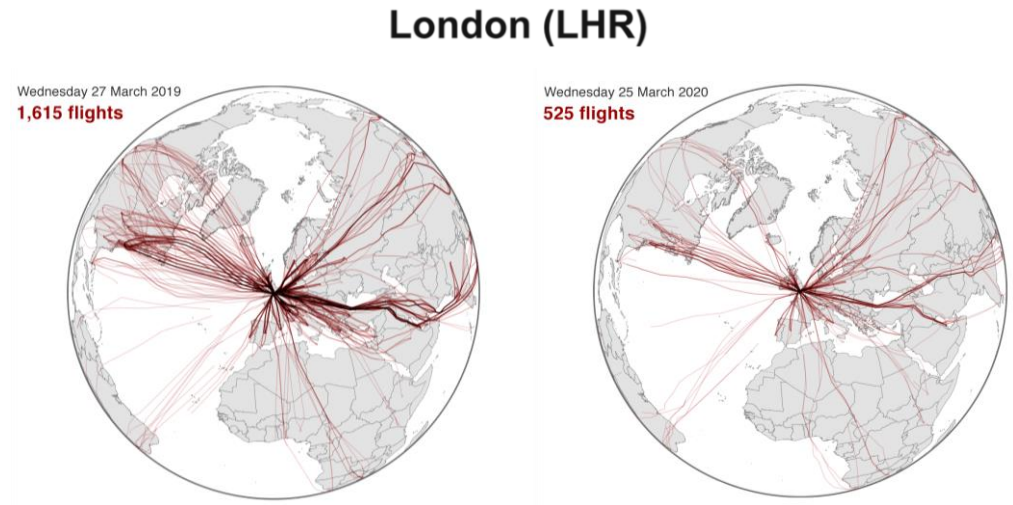
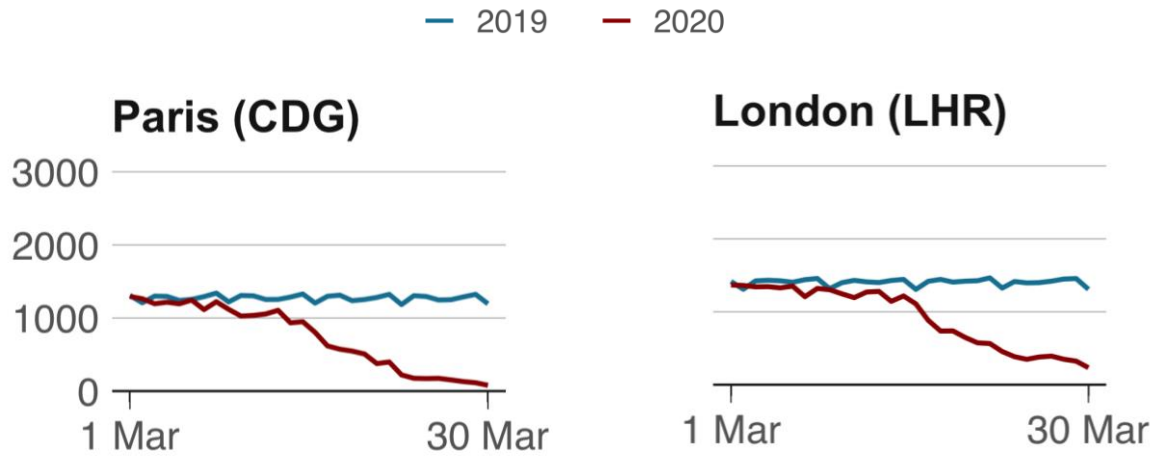
First case
  Localised recommendations
  National recommendations
  Localised lockdown
  National lockdown



SOURCE: OXFORD COVID-19 GOVERNMENT RESPONSE TRACKER, BBC RESEARCH

# TRAVEL IN EUROPE

Air traffic from European airports has decreased:



SOURCE: FLIGHTSTATS.COM VIA BBC

# WORLDWIDE TRAVEL RESTRICTIONS



**30th January 2020** – The World Health Organization (WHO) declared COVID-19 a Public Health Emergency of International Concern

The latest data from the United Nations shows that, since then:

- **100%** of destinations have travel restrictions in place
- **83%** have had restrictions in place for over four weeks
- **45%** have totally or partially closed their borders for tourists
- **30%** have suspended totally or partially international flights
- **18%** are banning passengers from specific destinations
- **7%** are applying measures such as quarantine / visa measures

**ELLE**  
INTERNATIONAL

**Lagardère**  
global advertising

SOURCE: UNWTO

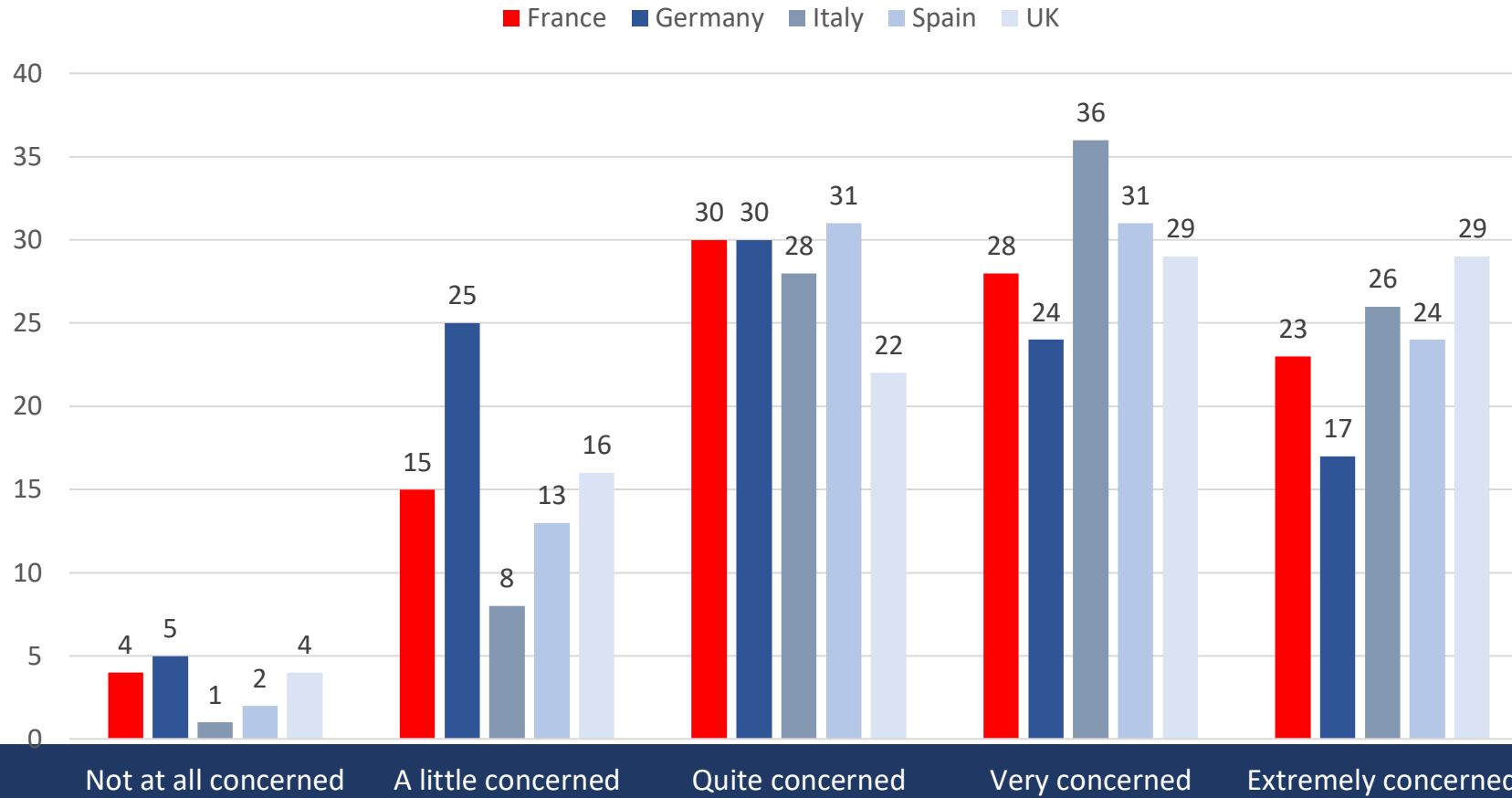


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# ATTITUDES TO THE OUTBREAK IN EUROPE

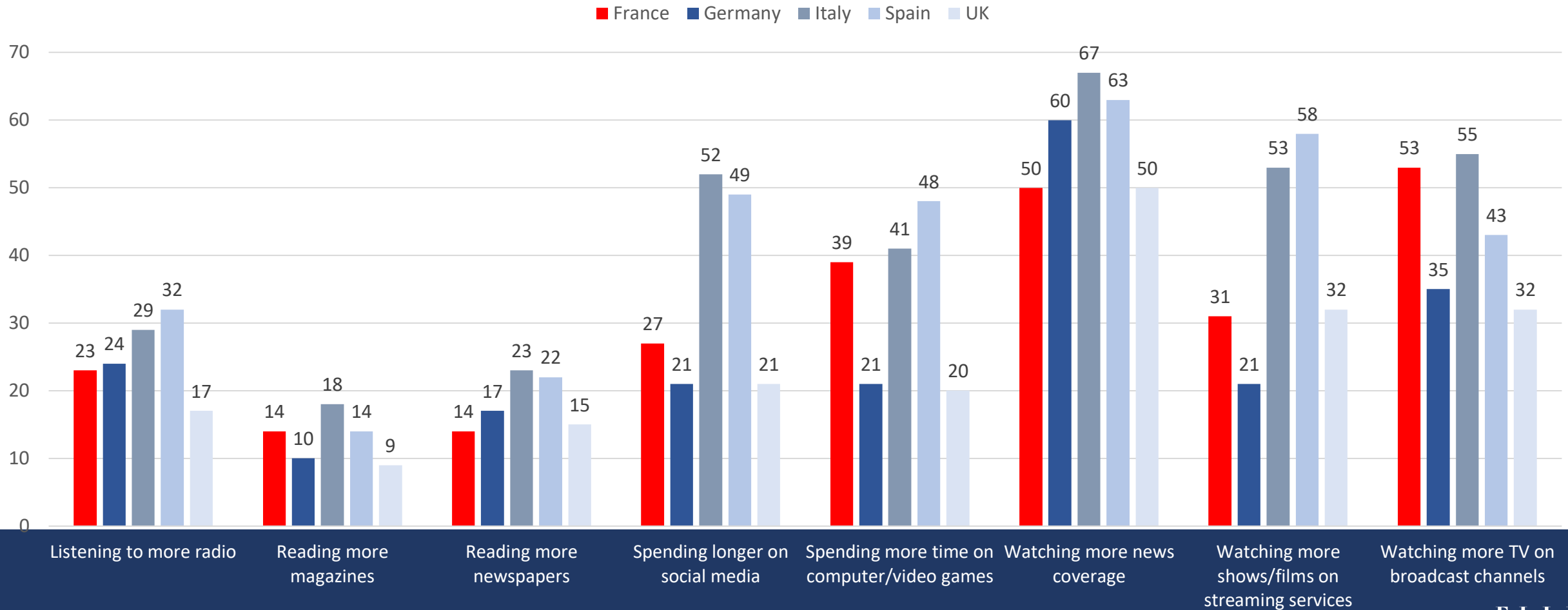
% who say that they are concerned about the COVID-19 situation



SOURCE: GWI CORONAVIRUS RESEARCH, MARCH 2020

# MEDIA CONSUMPTION IN EUROPE

% who say that they have been doing more the following at home because of the COVID-19 outbreak

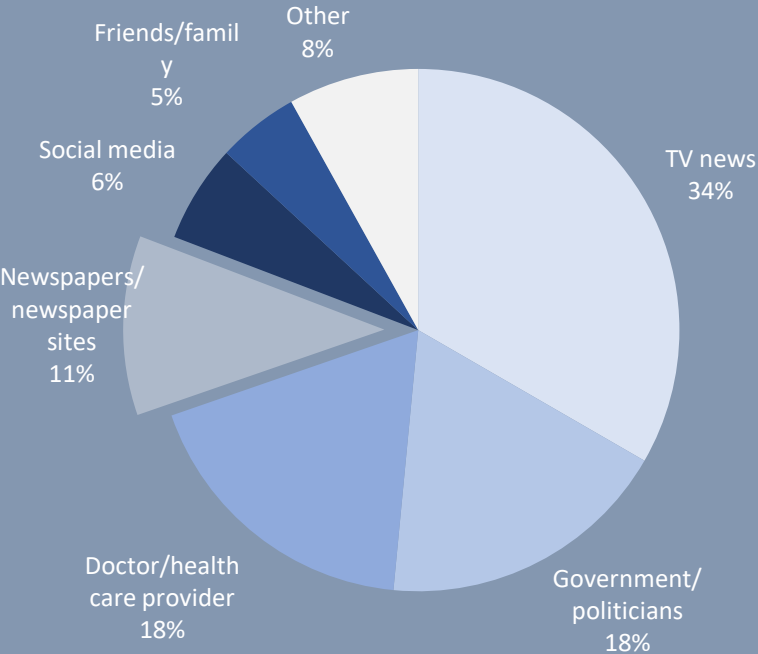


SOURCE: GWI CORONAVIRUS RESEARCH, MARCH 2020

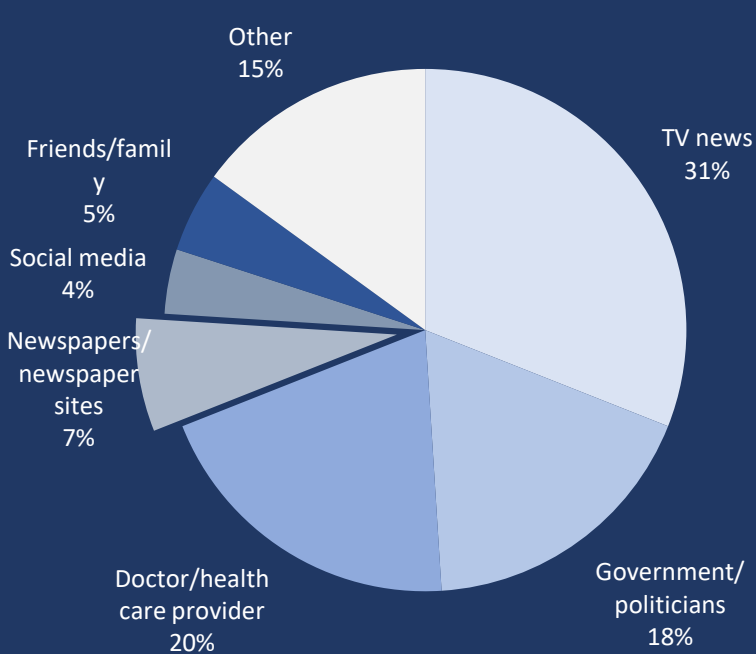
# MEDIA CONSUMPTION TRENDS & BEHAVIORS

Most trusted sources to obtain information about COVID-19, March 2020 (%)

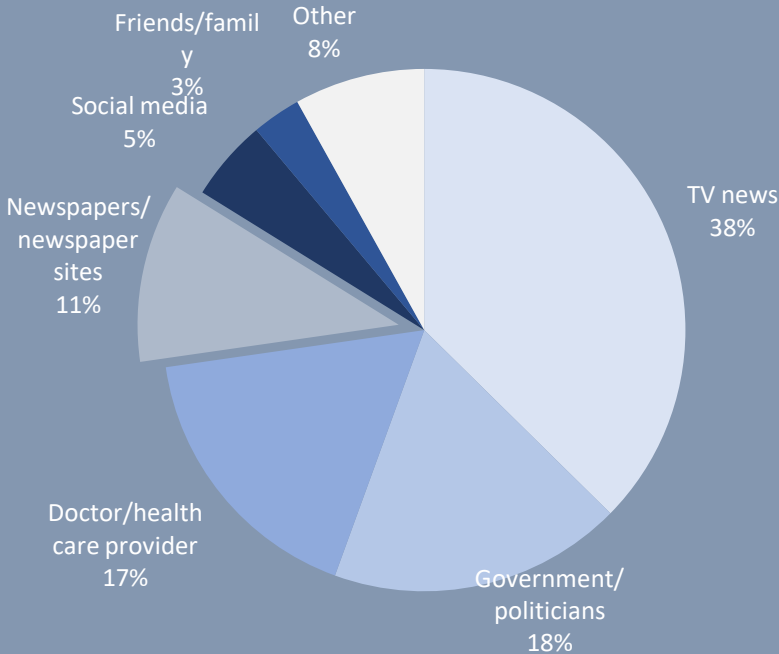
## FRANCE



## GERMANY



## ITALY



# MEDIA CONSUMPTION TRENDS & BEHAVIORS



In **France** in March 2020 compared to March 2019:

- Daily online surfing time increased **+25%**
- Approx. **45.8 million** individuals (**73.1%** of the population) surfed the internet everyday
- The average online surfing time was **2h35**

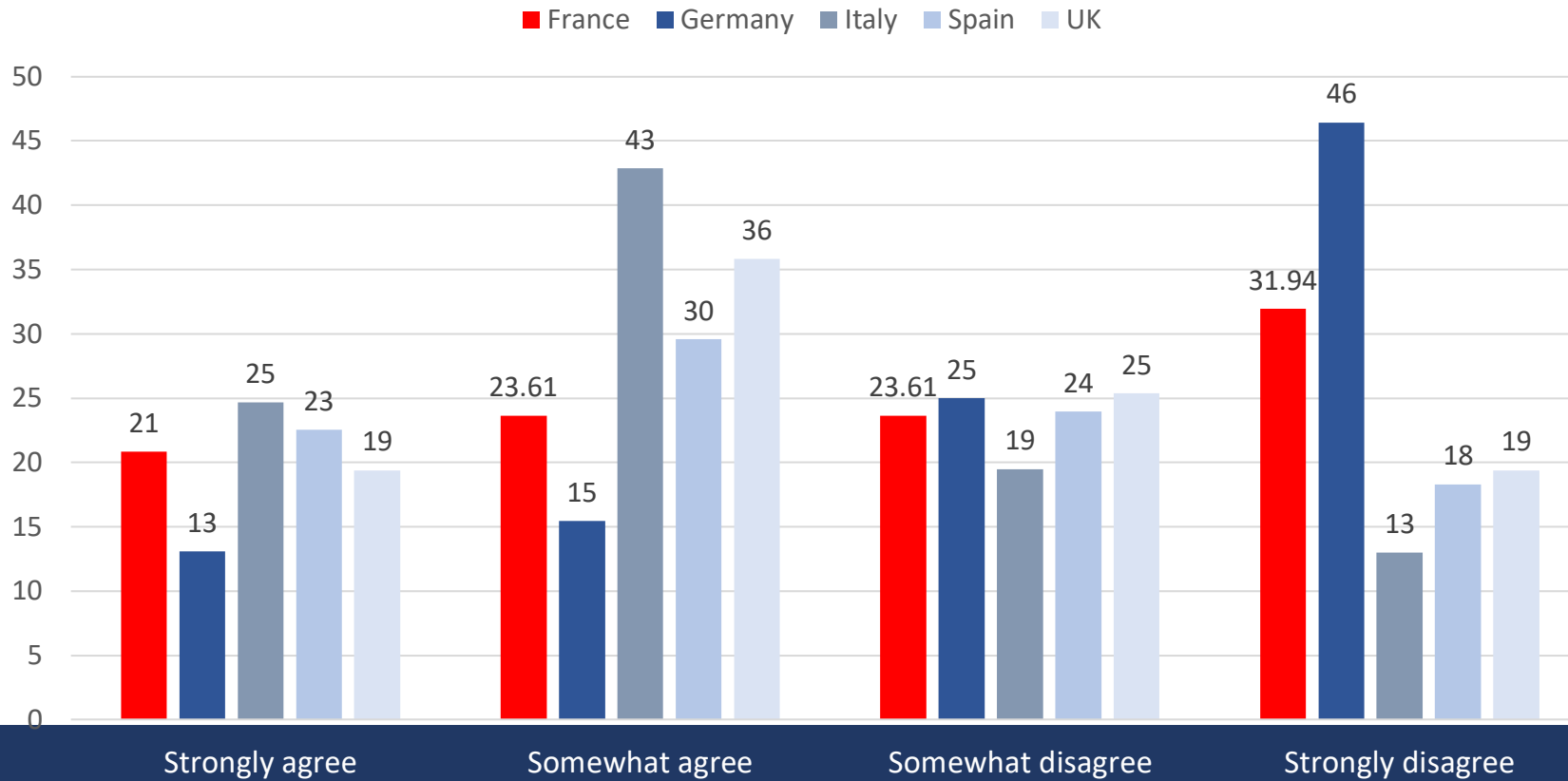
Also in March 2020 vs compared to March 2019:

- ELLE France UVs were up **+34%**
- ELLE Germany UVs were up **+19%**
- ELLE Spain UVs were up **+11%**
- ELLE UK UVs were up **+40%**

SOURCE: MEDIAMETRIE NETRATINGS MARCH 2020 / PUBLISHER DATA

# COMMUNICATING IN CRISIS

% who agree/disagree that brands should advertise as normal during the crisis



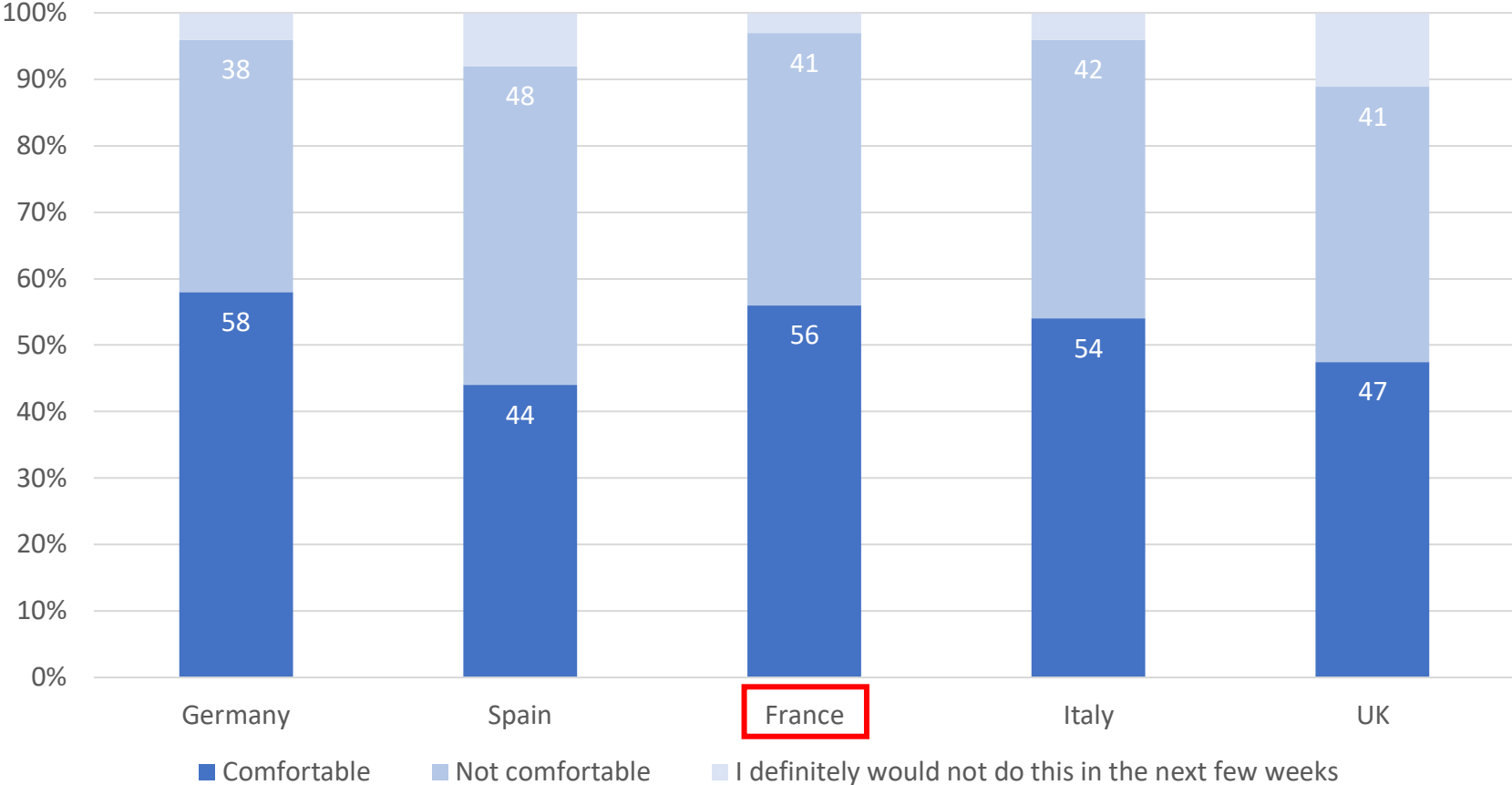
% who strongly/somewhat agree that brands should advertise as normal:

France – 36%  
 Germany – 28%  
 Italy – 68%  
 Spain – 53%  
 UK – 55%



# ADJUSTING TO LIFE AFTER THE OUTBREAK

How comfortable would you be with going back to the workplace?



SOURCE: IPSOS, MAY 7-10 2020



# COMMUNICATING IN CRISIS

# COMMUNICATING IN CRISIS

When the crisis comes to an end, consumers are unlikely to start searching for new brands, but rather will **gravitate towards brands that they know they can trust** based on the actions they are observing now.

Consumers may take notice of luxury brands' **display of reactivity, consistency and sense of purpose.**

## BE TRANSPARENT

**75%** believe that a brand should *'inform consumers about its efforts in the current pandemic'*.

## BUILD RELATIONSHIPS

**70%** believe that a brand should *'adopt a reassuring tone'*.

## BE PRACTICAL

**70%** believe that a brand should *'talk about [its] utility in new daily life'*.



SOURCE: KANTAR STUDY ON 25 000 CONSUMERS WORLDWIDE

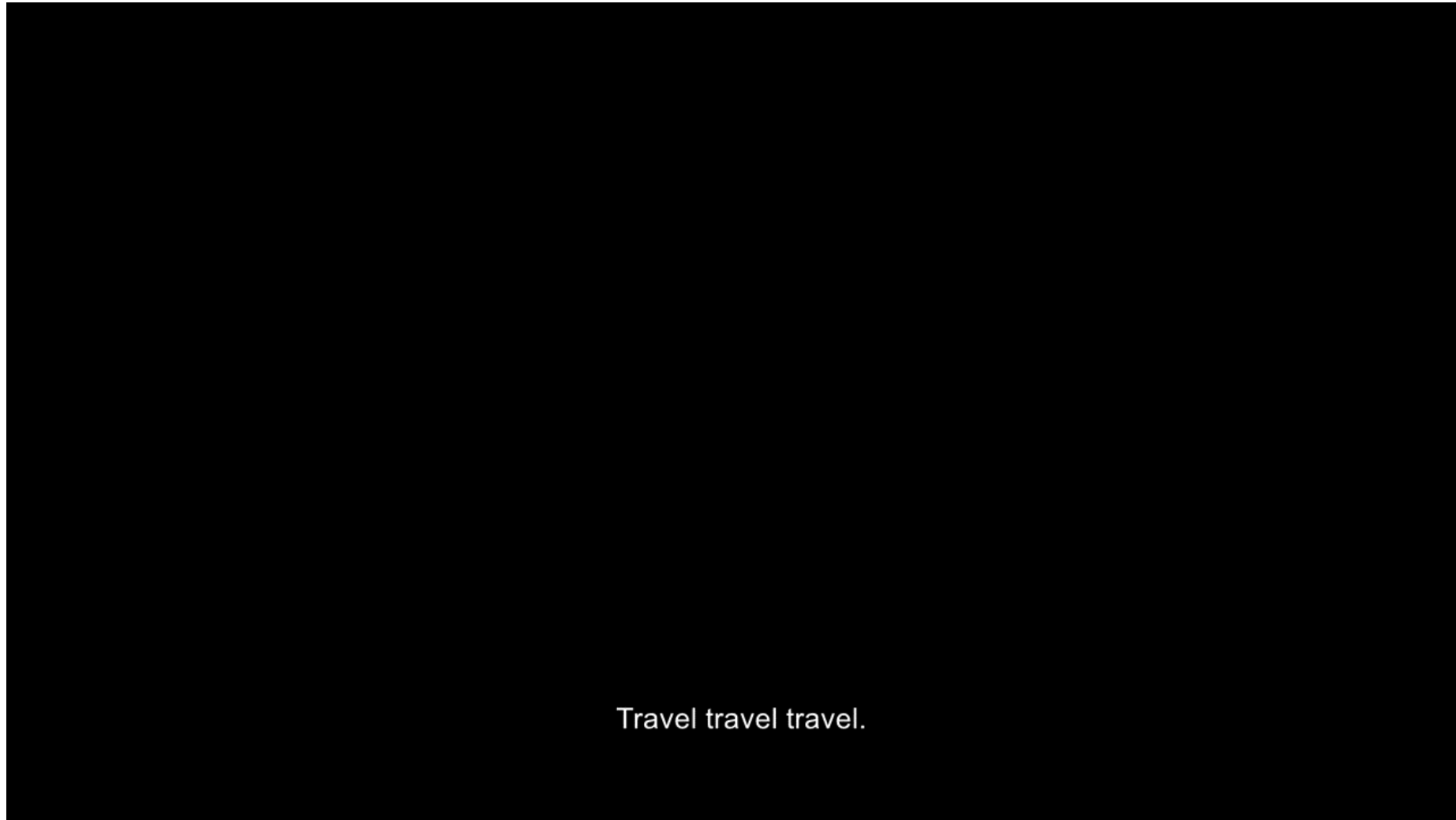
# FINDING THE RIGHT BALANCE IN BRANDING

Example : Accor - The Love Of Travel



# FINDING THE RIGHT BALANCE IN BRANDING

*Example : Accor - The Love Of Travel*



Travel travel travel.



# MULTI-MEDIA INFLUENCER COLLABORATION for **SOFITEL**

## Goals:

- Build brand awareness
- Create desirability & engagement
- Position Sofitel as an ambassador of modern French Art de Vivre around the world

## Our Concept : ELLES LIVE THE FRENCH WAY

Based on the ELLE Lifestyle pillar, we created an immersive article offering French-inspired lifestyle tips, and a series of films through which three ELLE women shared how they 'Live The French Way' wherever they are, inspired by the allure of French style that Sofitel embodies.

## We created:

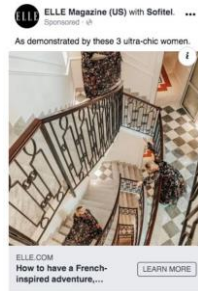
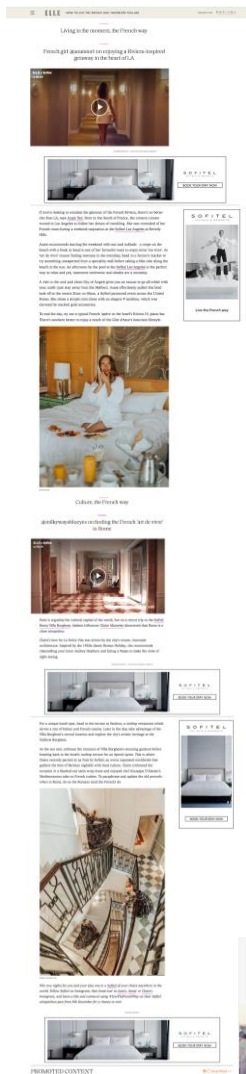
- One digital article highlighting the 'Live the French Way' concept
- Three videos in collaboration with top-tier influencers
- Co-branded online GIF advertising banners
- Social media campaign – Instagram/Facebook

## Countries:

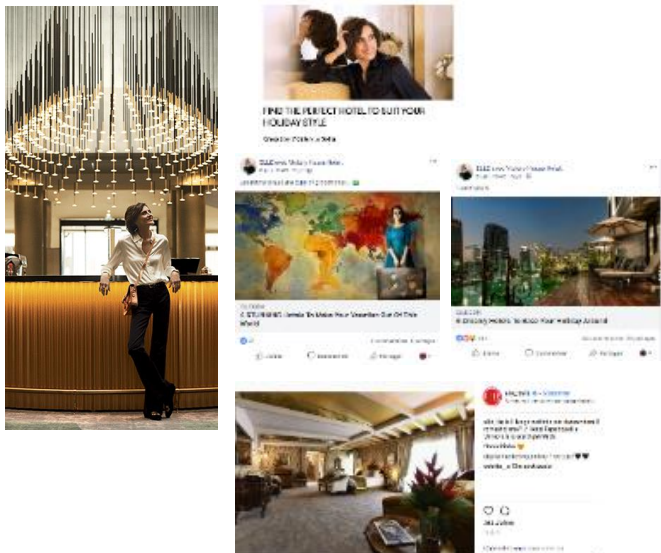
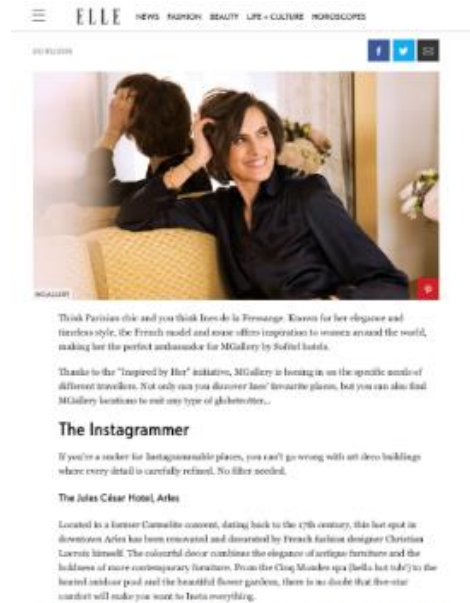
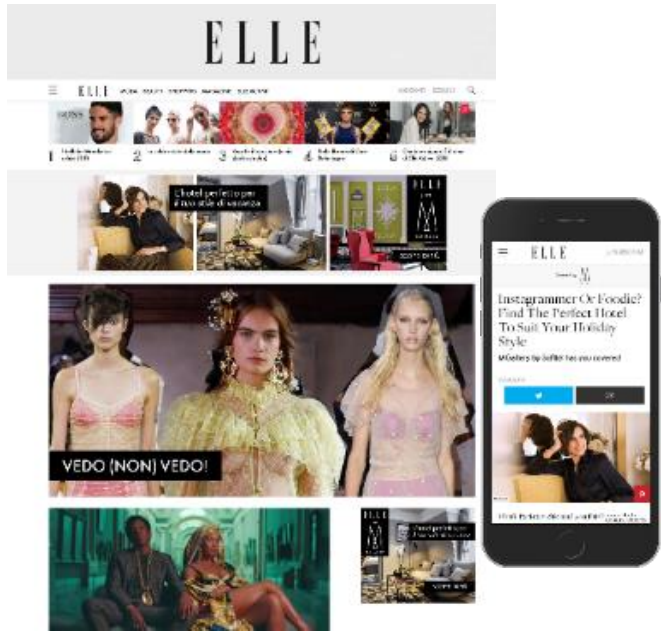
France, UK and US

## Results:

- **+ 1 M reach ; + 4 M impressions**
- **Average time spent: 2.20 minutes**



# DIGITAL BRANDED CONTENT creation for M GALLERY



## Goals:

- **Notoriety:** Introduce MGallery boutique hotels to the fashionable international community.
- **Pedagogy:** Provide details on the different services and advantages of the hotels through the utilization of brand's four pillars: **design, art, mixology and service inspired and tailored to women.**
- **Image:** Using a premium and highly feminized context to facilitate communication.

## Our Concept :

In collaboration with two of ELLE's pillars Lifestyle and Fashion, we have created a series of photos and an exclusive article that place an emphasis on the brand's four pillars.

## We created:

- One digital article highlighting the four pillars
- Cobranded online GIF advertising banners
- Social network campaign – Instagram/Facebook

## Countries:

France, Italy and UK

## Results:

- **185 819 views**
- **Average time spent: 1.21 minutes**



# 6-COUNTRY PRINT CAMPAIGN for JAPAN NATIONAL TOURISM ORGANIZATION



## Goals:

- Increase tourism awareness
- Promote the cuisine of Japan
- Create desirability & engagement

## ELLE Global Concept: « Tantalising Tastes of Japan »

- A global concept adapted locally
- 100% print
- Double page brand content

## Countries:

France, Italy, Spain, UK, Germany, US

## Campaign results:

Over 1.4M circulation

# TRAVEL INDUSTRY FORECAST

Although the coronavirus crisis has resulted in global travel restrictions, the desire to travel among consumers has not gone away, with **40%** of **French** people stating wanting to go on holiday after lockdown was lifted.

## TRAVEL INDUSTRY TREND PREDICTIONS

- A shift away from **overtourism** and **homesharing services** such as Airbnb
- An increased demand for **privacy** and **luxury properties** such as villas and hotels with private entrances or elevators
- A tightening of **hygiene standards** in hotels, e.g. the Accor group's ALLSAFE initiative
- An increase in **single-use plastics** due to the attempt to stick to drastic hygiene measures
- A heightened awareness of how **spending locally** can help communities



SOURCE: REWORLD MEDIACONNECT VIA CBN



# LUXURY INDUSTRY FORECAST



Only **8%** of **French** people reported having delayed luxury purchases as a result of the coronavirus outbreak, with this figure remaining low elsewhere throughout Europe (**8%** in Germany, **13%** in Italy, **14%** in Spain and **8%** in UK).

## LUXURY INDUSTRY TREND PREDICTIONS

- Brands may become more **customer-centric**
- A shift towards **digitalization**
- Brands may become more **agile**, able to make faster decisions
- A **second-hand** market boom
- A shift towards **more responsible luxury**
- An increase in **local purchasing** due to travel restrictions

SOURCE: GWI CORONAVIRUS RESEARCH, MARCH 2020



# CASE STUDIES

Examples of the type of print communication offered for brands during the crisis: **ELLE**  
**ITALY**

ELLE è con voi

**CAUDALIÉ**  
PARIS

Anche isolati e distanti, si può restare vicini.  
Caudalie ha deciso di farlo tutti i giorni:  
con le sessioni di yoga e fitness su Instagram,  
i tutorial di cucina e make up, le attività per i bambini,  
le consulenze telefoniche degli esperti beauty  
per tutti gli amanti del brand.  
Un brand che dalla sua fondazione ha messo al centro  
il benessere delle persone e del pianeta.  
Con un obiettivo ambizioso: offrire una cosmesi  
sempre più clean e naturale, cruelty free e 100% sostenibile.

**#RIPARTIAMODAGUI**



\*Crediamo in una cosmesi verde e ragionata, che offre un giusto equilibrio tra naturalezza e sensorialità.  
Questa è la mission di Mathilde e Bertrand Thomas e dei loro prodotti a base di attivi  
di origine naturale rispettosi della pelle e dell'ambiente. Un impegno che passa anche attraverso  
il finanziamento di associazioni che agiscono a favore della riforestazione e della protezione degli alberi.

1000ELLE

*'Even isolated and distant, you can stay close. Caudalie has decided to do this everyday: with yoga and fitness sessions on Instagram, cooking and make-up tutorials, activities for children, and telephone consultations with beauty experts for all lovers of the brand. A brand that, since its creation, has focused on the wellbeing of people and the planet. With an ambitious goal: to offer cosmetics that are clean and natural, cruelty free and 100% sustainable. #LETSRESTARTFROMHERE'*


# CASE STUDIES

Examples of the type of print communication offered for brands during the crisis: **ELLE ITALY**

**ELLE**  
ECONOMI

# Dior

Quando all'improvviso il mondo  
sembra diventato in bianco e nero,  
troviamo dentro di noi tutti i colori dell'arcobaleno.  
La primavera è esplosa, malgrado tutto.  
La vita non si ferma.  
E anche questo inverno passerà.  
**#SIAMOCONTE**



© 2020 LVMH

Il colosso LVMH ha riconvertito i siti di produzione delle fragranze del gruppo  
in forniture di gel igienizzante da destinare  
alle strutture pubbliche francesi che combattono contro il coronavirus.

132ELLE

ELLE 133

# CASE STUDIES

Examples of the type of print communication offered for brands during the crisis: **ELLE**  
**ITALY**

ELLE è con voi



*Quando il mondo sembra di pietra,  
bisogna fare un salto per osservare le cose  
dall'alto e sottrarre gravità.  
Da lassù si vede ancora il futuro,  
rosa, dietro la linea dell'orizzonte.*

**#SIAMOCONTE**



STUDIO D'ADVERTISING

# CASE STUDIES

Examples of the type of print communication offered for brands during the crisis: **ELLE**  
**SPAIN**

ELLE  
1945-2020

## PRADA

Haz lo que puedas, con lo que tienes, allá donde estés.

La fortaleza reside en el convencimiento de que el resurgir

está muy cerca. La primavera volverá a florecer.

¿Lo único que no puedes olvidar?

ESTAMOS CONTIGO

PRADA se suma de forma activa a la lucha contra el coronavirus mediante ayudas económicas para la apertura de varias UCIs en hospitales de Milán y la fabricación de 80.000 batas médicas y 110.000 mascarillas para el personal sanitario. Además, la Fondazione Prada abre sus puertas virtuales en un esfuerzo por trasladar sus exposiciones y actividades a un mundo conectado, ahora, exclusivamente a través de la tecnología.



Pronto volveremos a comprar flores

5

Amount of charts  
I have left

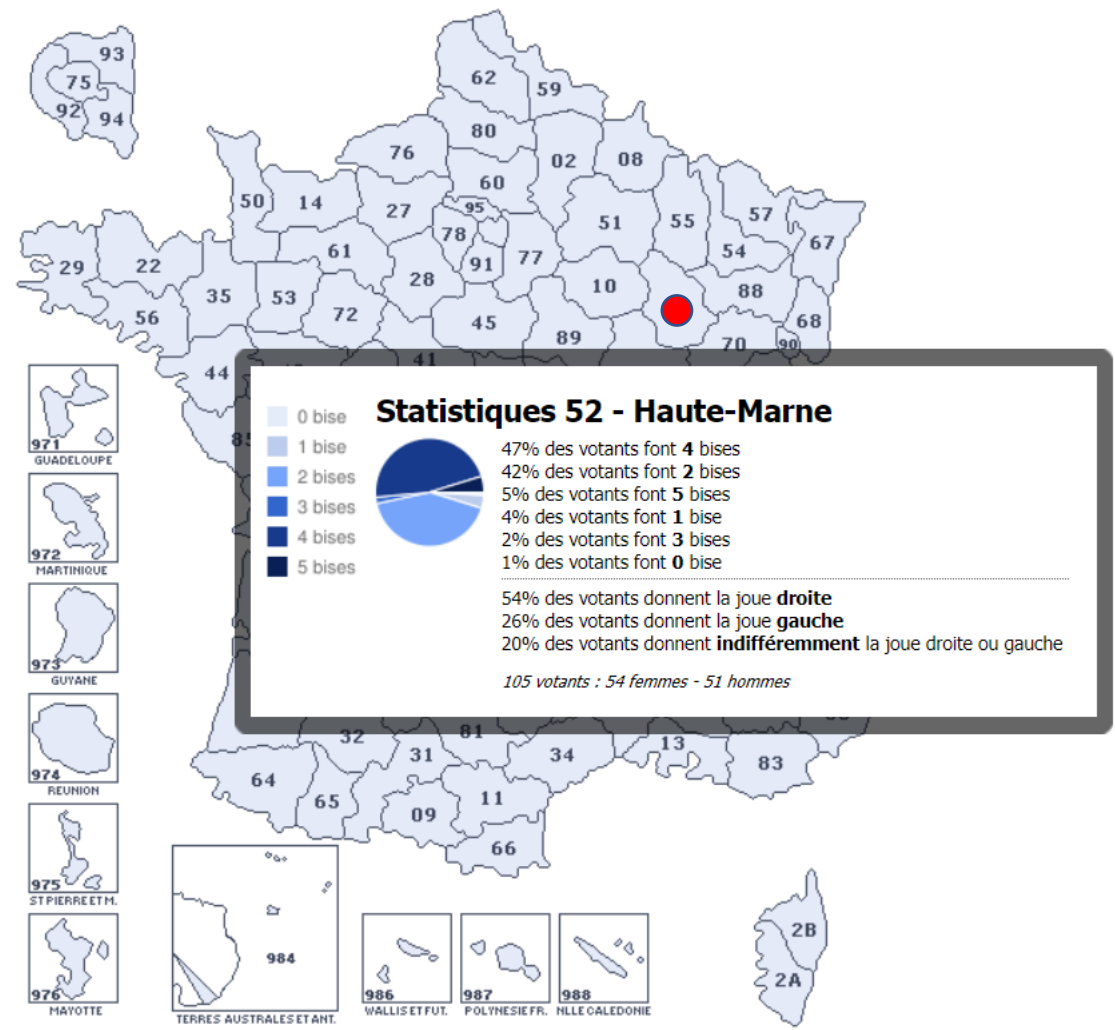
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# A VERY FRENCH PROBLEM



# A VERY FRENCH PROBLEM



# A VERY FRENCH PROBLEM

91%

# A VERY FRENCH PROBLEM

14%

# The Positive Relational Effect of the Pandemic

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