REWIRE TO RESTART:
THE POST-COVID-19 AGENDA FOR TECHNOLOGY AND MEDIA COMPANIES

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JUNE 10, 2020

Rewire to Restart: We Have Determined How Technology and Media Habits Have Changed During Shelter in Place and What Will Happen When People Return to Their Daily Lives

Over the last few months, through multiple consumer research studies, we've tracked tech and media usage, new behaviors, value drivers, time spend, shopping, and cultural shifts.

Our research has covered the major businesses across the technology, internet, media, and entertainment ecosystem: connectivity, eCommerce, devices, music, news, out-of-home, social media, sports, video, video games, web browsing, and wireless. In addition, we've identified preferences for new digital activities and innovations.

Overall, the research findings show that coming out of shelter in place, people's habits, activities, and expectations are now fundamentally changed. They will look at things differently, in terms of what they will value, where they will spend their time on technology, entertainment, and leisure, and how they will spend their money when they return.

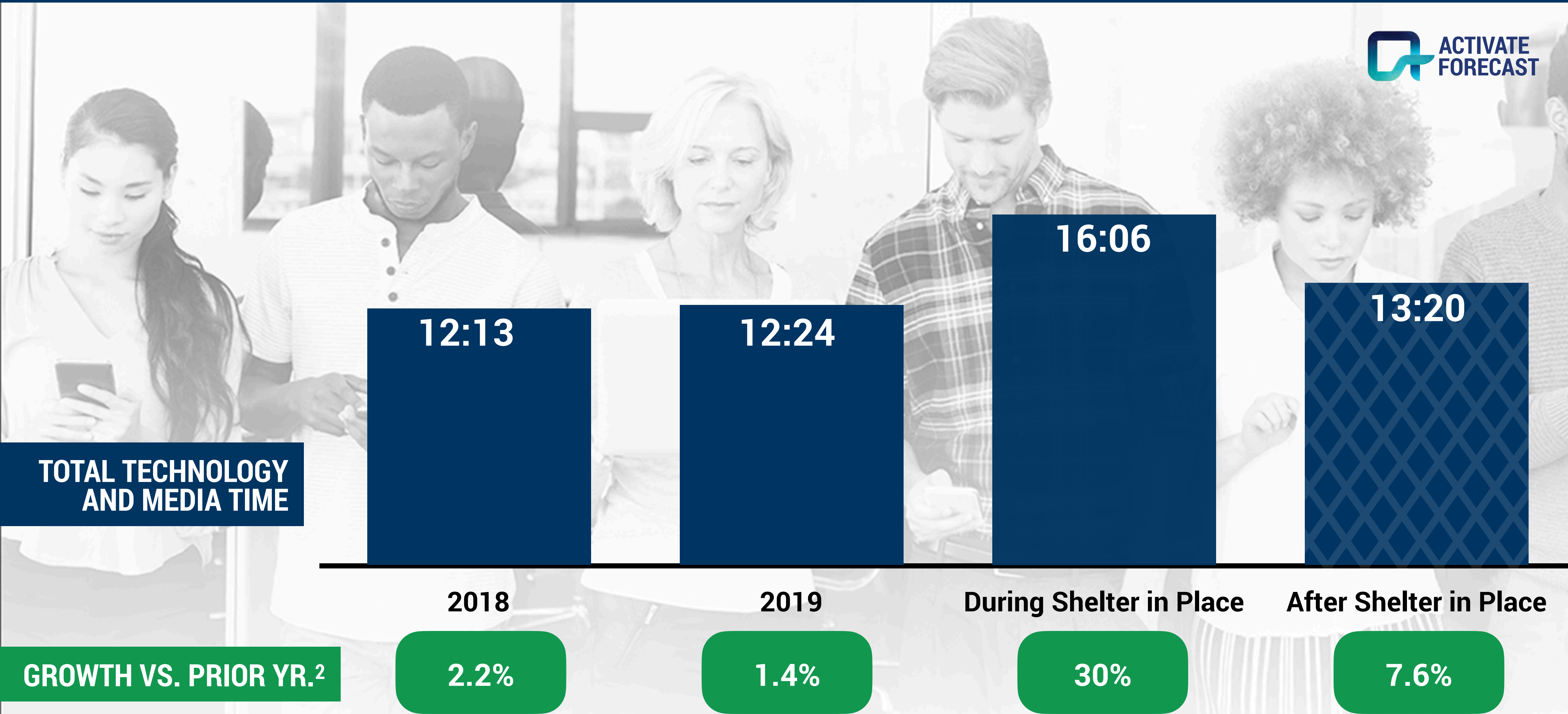
In addition, the research points to an actionable agenda: to serve people's new needs and expectations and thrive in this post-Covid era, technology and media companies will need to *rewire* many of the ways they engage their users and consumers, including their value proposition, programming, experience, functionality, pricing, and marketing.

We know that you'll find the report insightful and provocative, and we look forward to a lively discussion.

The Activate Consulting Team

Time spend with technology and media has jumped during shelter in place – shifting the growth curve upwards for these industries

DAILY TECHNOLOGY AND MEDIA ATTENTION PER ADULT AGED 18-64[1], U.S., 2018-2020, HH:MM



Note: "During Shelter in Place" refers to consumer behavior during the 2020 coronavirus outbreak and subsequent social distancing/ shelter in place measures. "After shelter in place" refers to projected consumer behavior averaged over the 12 months after consumers' daily lives and routines return to normal (e.g. in-person school and work resume, socializing in person).
1. Behaviors averaged over 7 days and include all video, web browsing, video gaming, audio, and social media time spend.
2. "During Shelter in Place" and "After Shelter in Place" growth rates are calculated based on 2019 time spend.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925), Comscore, eMarketer, Gallup, Global Web Index, Interactive Advertising Bureau, Music Biz, Nielsen, Pew Research Center, U.S. Bureau of Labor Statistics

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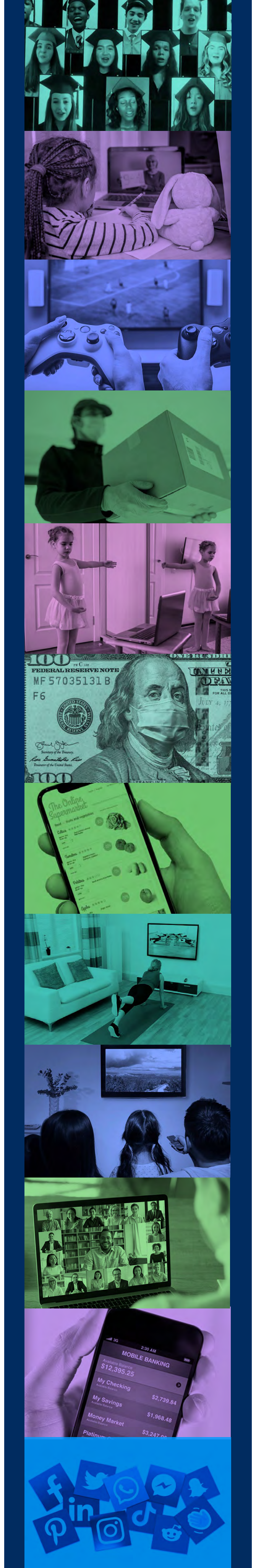
REWIRE TO RESTART

- **SUSTAIN INCREASED DEMAND**
- REACTIVATE AND ACQUIRE CUSTOMERS
- ACCELERATE NEW TECH EXPERIENCES
- THE ACTIONABLE REWIRE TO RESTART AGENDA



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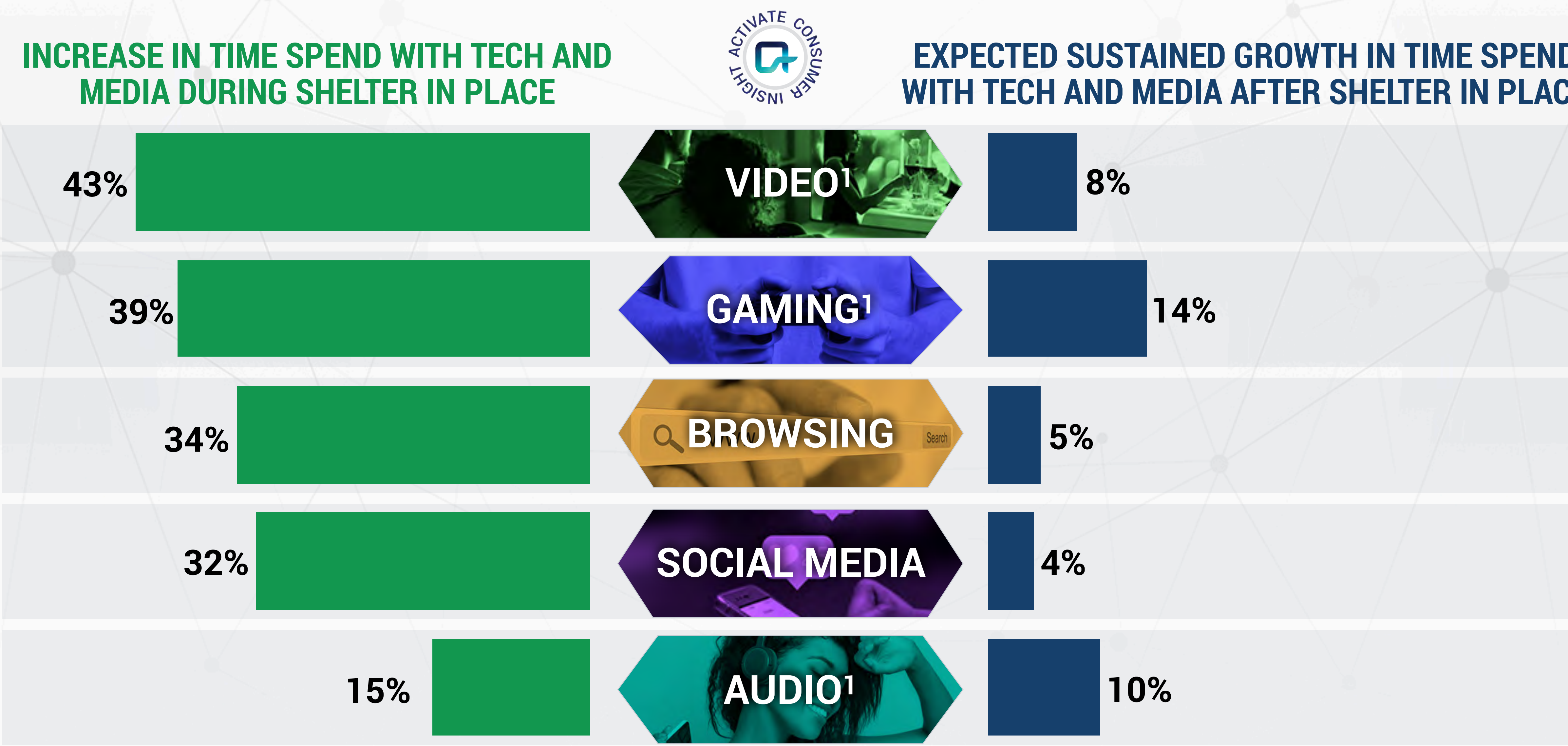
Rewire challenge: sustaining the spike in consumer time spend with technology and media services

AFTER CONSUMERS RETURN TO IN-PERSON ACTIVITIES, GROWTH WILL BE SUSTAINED ACROSS ALL OF THE MAJOR CONSUMER TECH AND MEDIA ACTIVITIES

TIME SPEND WITH TECHNOLOGY AND MEDIA BY ADULTS AGED 18-64, U.S., % INCREASE VS. 2019



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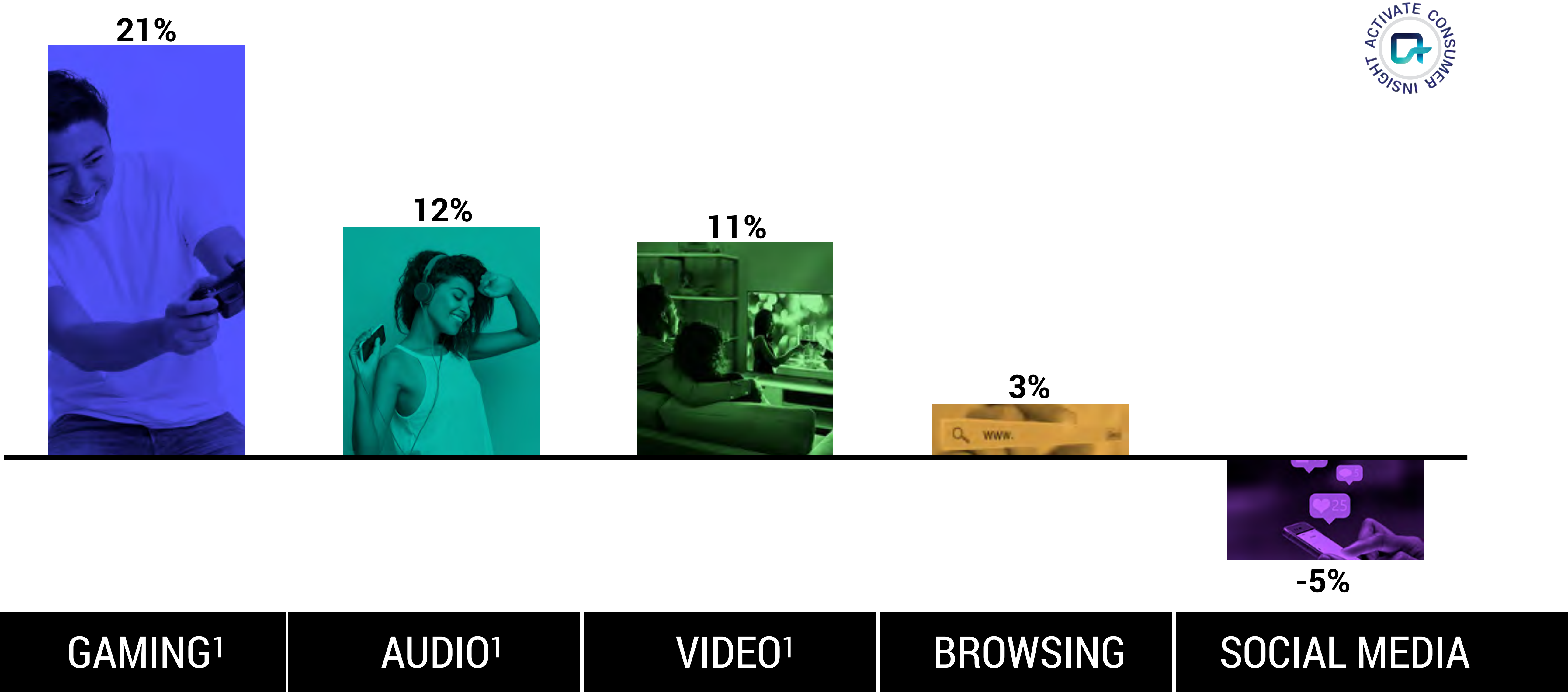
1. "Video" includes web video, AVOD, SVOD, TVOD, and Pay TV and excludes social video. "All gaming" includes console, mobile, PC, online, and subscription gaming. "Audio" includes podcasts, streaming music, and radio.

Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925)

For 18 to 24 year-olds, gaming, audio, and video will offer significant opportunities for growth

EXPECTED TIME SPEND WITH TECHNOLOGY AND MEDIA AFTER SHELTER IN PLACE BY ADULTS AGED 18-24,
U.S., % INCREASE VS. 2019



1. "Video" includes web video, AVOD, SVOD, TVOD, and Pay TV and excludes social video. "Gaming" includes console, mobile, PC, online, and subscription gaming. "Audio" includes podcasts, streaming music, and radio.

Sources: Activate analysis, Activate Consumer Tech & Media Study 2020 (n = 1,925)

With more time at home, consumers have increased their usage of video streaming services — content providers will need to compete to retain these users post-return

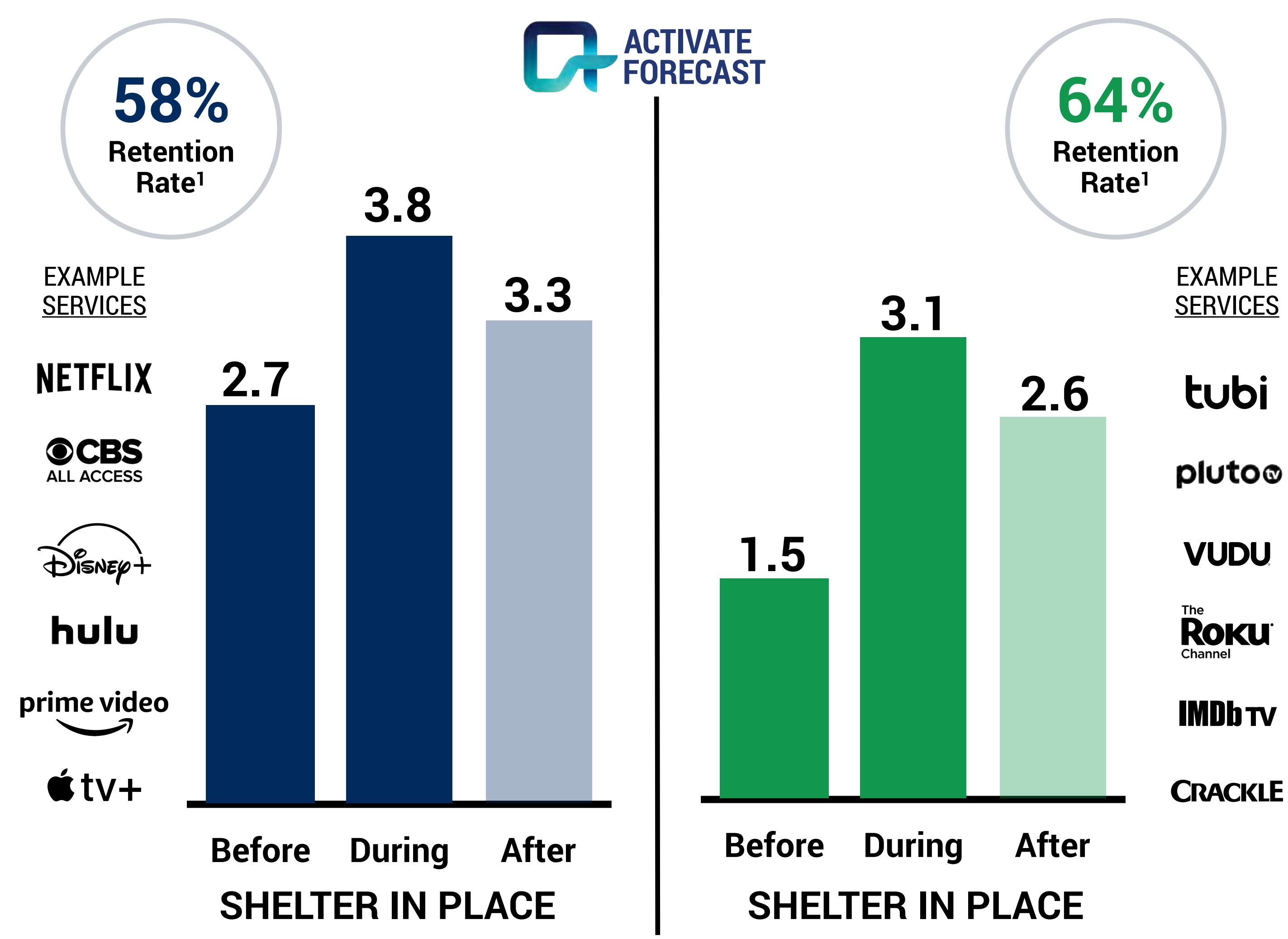
44% OF STREAMING VIDEO USERS STARTED USING A NEW STREAMING SERVICE SINCE SHELTER IN PLACE…

ADDITION OF NEW VIDEO STREAMING SERVICES SINCE SHELTER IN PLACE BEGAN, U.S., 2020, % VIDEO STREAMING USERS AGED 18+

ACTIVATE CONSUMER INSIGHT

…THE AVERAGE NUMBER OF SVOD AND AVOD SERVICES WILL INCREASE VS. BEFORE SHELTER IN PLACE

SVOD SERVICES PER USER | **AVOD SERVICES PER USER**



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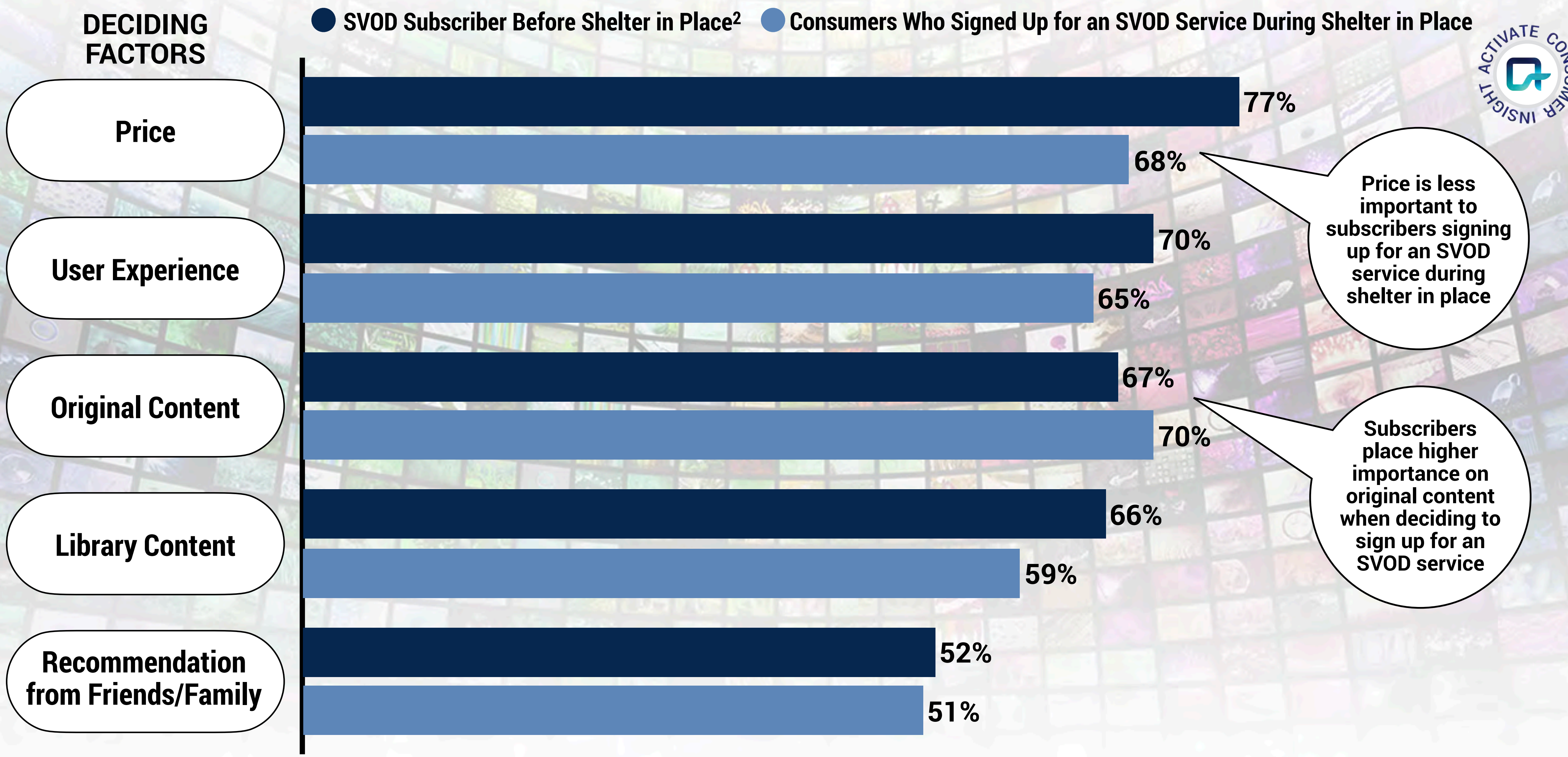
1. Retention rate refers to the intent to continue paying for or using the new streaming video service added since shelter in place.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866)

For paid streaming video, increased demand is leading to higher willingness to pay; content providers will need to restructure pricing and enhance the value proposition to sustain demand and retain subscribers

IMPORTANCE[1] OF FACTORS IN DECISION TO SIGN UP FOR SVOD SERVICE(S),
U.S., 2019 VS. 2020, % SVOD SUBSCRIBERS AGED 18-64



1. Consumers who consider the factor as "very" or "quite" important.
2. Adults aged 18-64 who personally purchased a subscription video streaming service, surveyed in 2019.

Sources: Activate analysis, Activate 2019 Consumer Tech & Media Research Study (n=4,006), Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925)

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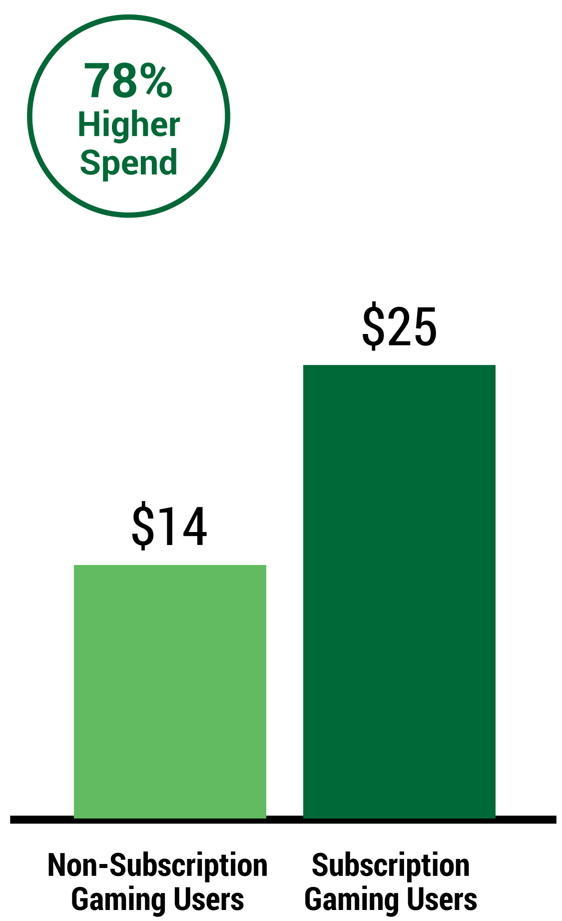
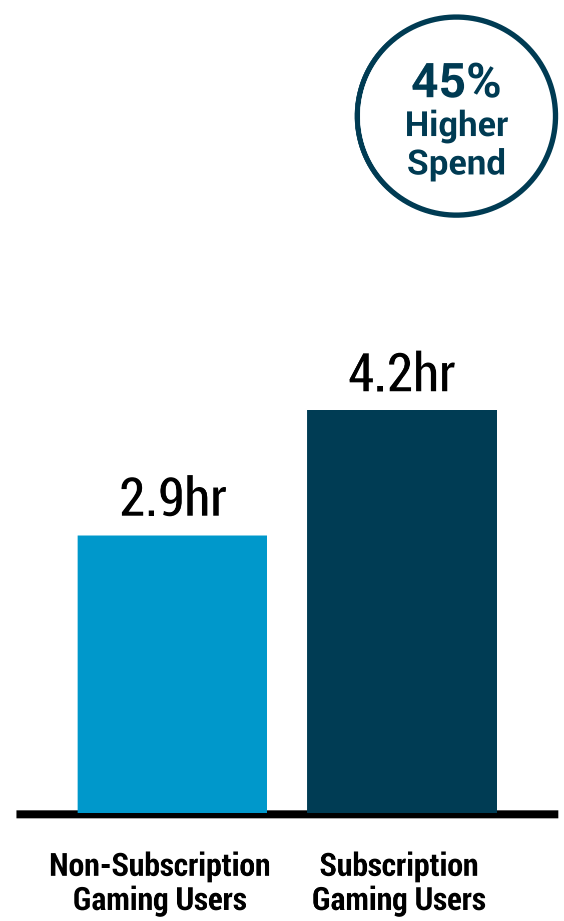
The number of gaming subscribers has jumped during shelter in place; the challenge for gaming companies is to retain these high value gamers after restrictions are lifted

AMOUNT AND TIME SPEND BY GAMERS, U.S., 2019, USD/MONTH AND HOURS/DAY

SUBSCRIBERS TO GAMING SERVICES ARE HIGHER-VALUE PLAYERS OVERALL



DOLLARS SPENT PER MONTH



HOURS SPENT PER DAY

GAMING SUBSCRIPTION PENETRATION, U.S., 2020, % GAMING SUBSCRIBERS

DURING SHELTER IN PLACE, 20% OF GAMING SUBSCRIBERS ARE NEW USERS[1]

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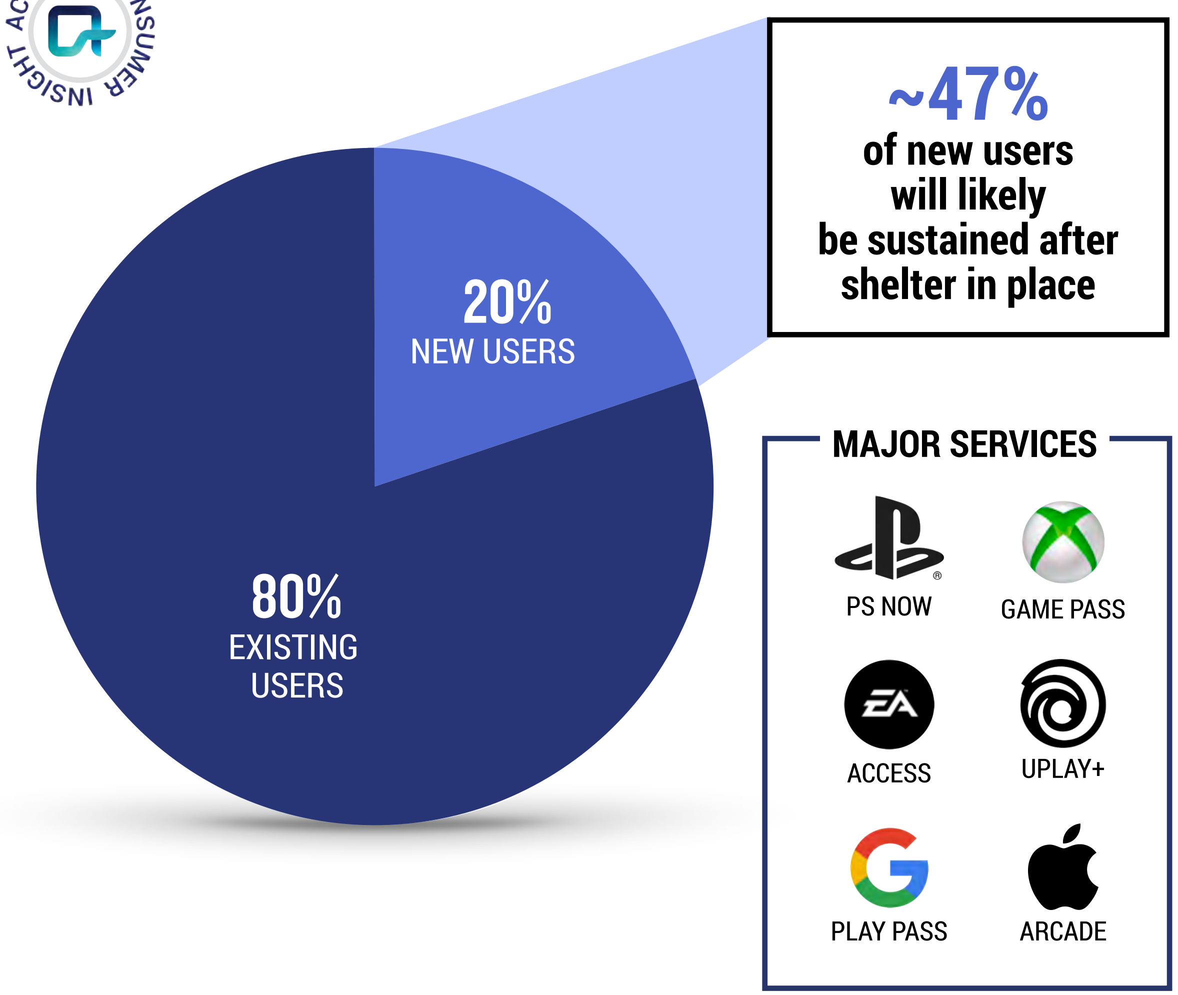


1. "New Users" defined as gamers who have begun using a subscription gaming service since shelter in place and did not subscribe in the 12 months prior to shelter in place.
Sources: Activate analysis, Activate 2019 Consumer Tech & Media Research Survey (n=4,006), Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866)

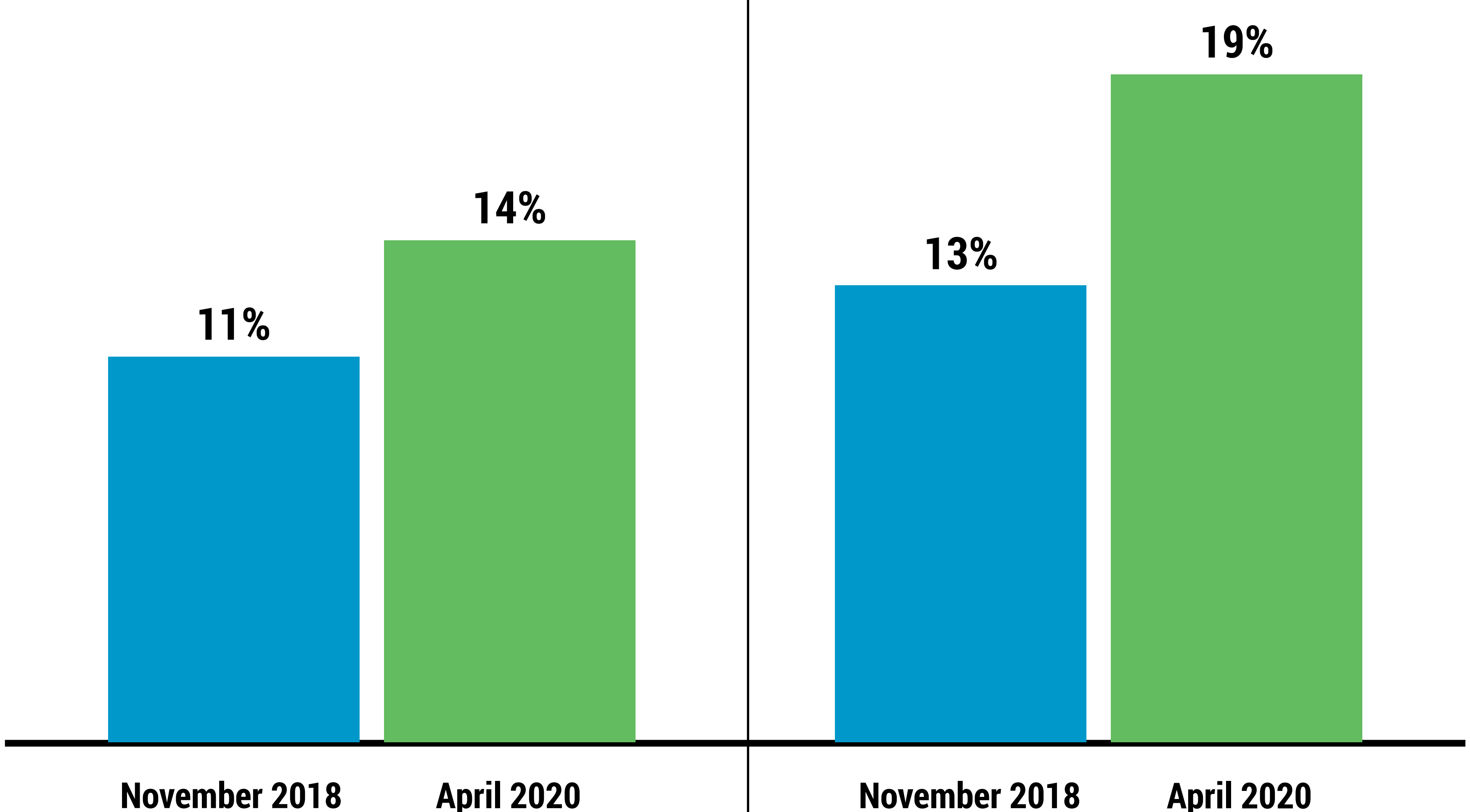
Brands can take advantage of the increased willingness to pay for news while expanding the use of freemium pricing as a funnel for new subscribers

ONLINE NEWS SUBSCRIPTION STATUS AND WILLINGNESS TO PAY,
U.S., 2018 VS. 2020, % ADULTS AGED 18+

ACTIVATE CONSUMER INSIGHT

PAID FOR AN ONLINE NEWS SUBSCRIPTION IN THE PAST 12 MONTHS

HAVE NOT PAID, BUT LIKELY TO PAY IN THE NEXT 6 MONTHS



FREEMIUM STRATEGY: LOWERING PAYWALLS HAS DRIVEN HIGHER TRIAL AND CONVERSION TO PAY

EXAMPLE PUBLISHERS WITH INCREASED TRIAL/CONVERSION

The New York Times

The New Yorker

Bloomberg

The Atlantic

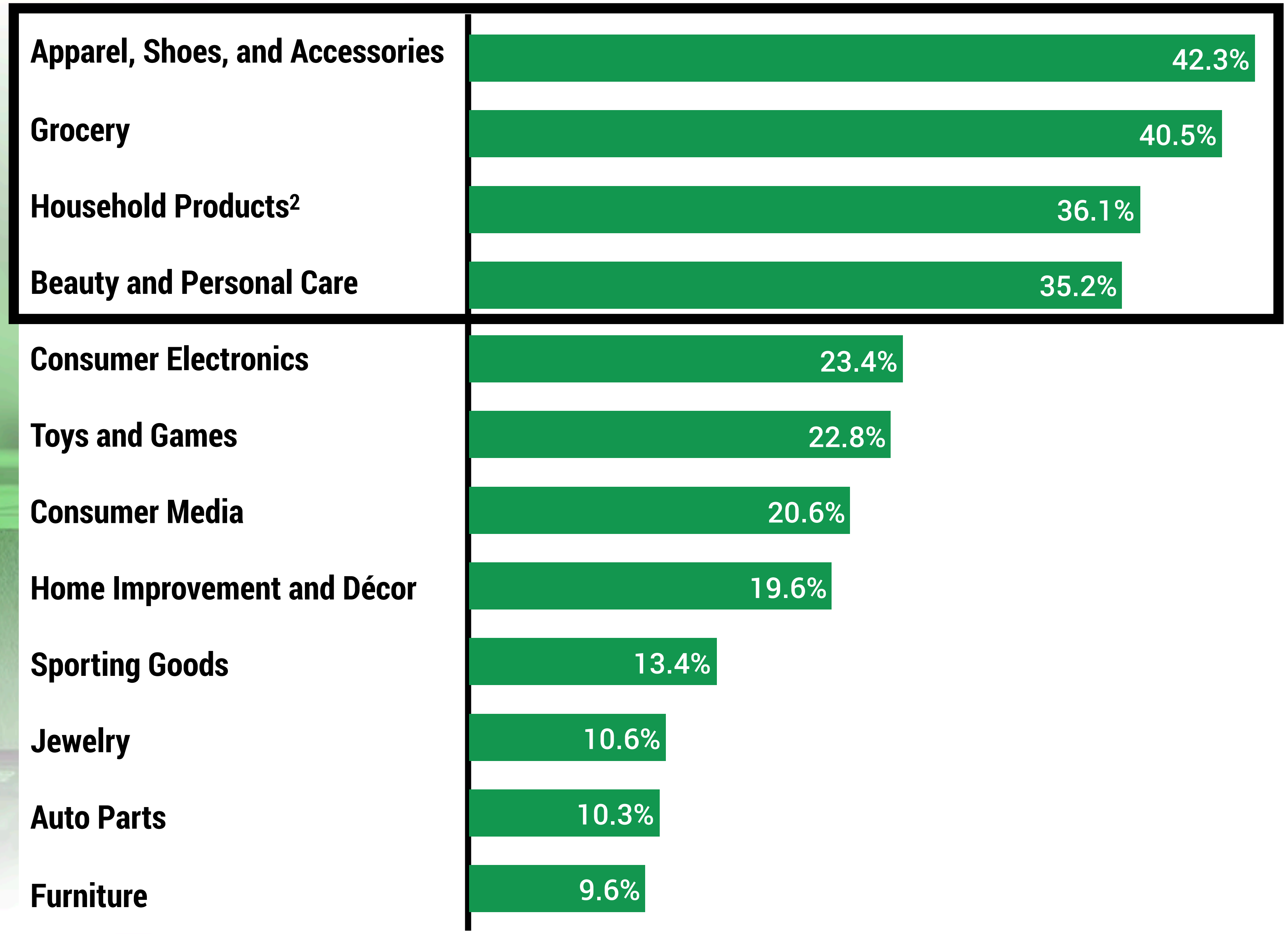
The Wall Street Journal

The Washington Post

Sources: Activate analysis, Activate 2019 Consumer Tech & Media Research Study (n=4,006), Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866), Company sites

Essential categories such as grocery and household products have been among the largest areas of eCommerce activity during shelter in place

ECOMMERCE PENETRATION[1] DURING SHELTER IN PLACE BY PRODUCT CATEGORY, U.S., 2020, % ADULTS AGED 18-64



1. % adults aged 18-64 who have made an online purchase in the category at least once during shelter in place.
2. "Household Products" includes cleaning supplies (e.g. paper towels, Clorox).

Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925)

Participation in online grocery usage has spiked; to sustain these new customers after shelter in place, online grocery services will need to deliver against key value drivers: free delivery and product assortment

LIKELIHOOD TO CONTINUE ONLINE GROCERY SHOPPING AFTER SHELTER IN PLACE, U.S., 2020, % NEW ONLINE GROCERY CUSTOMERS[1] AGED 18+

14% of **Online Grocery Shoppers** are **New**

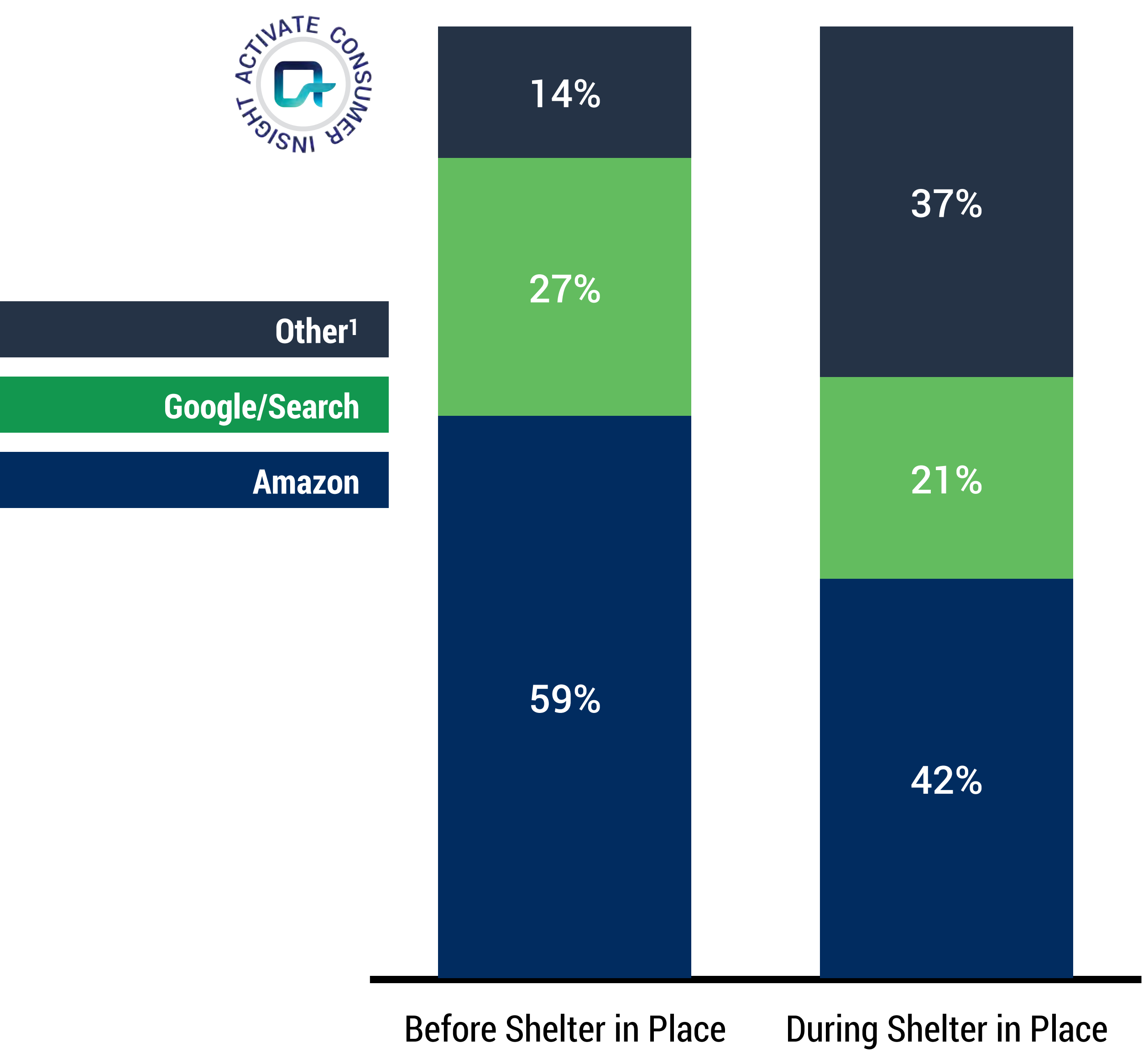
TOP ONLINE GROCERY VALUE DRIVERS, U.S, 2020, % ONLINE GROCERY CUSTOMERS[1] AGED 18+

NEW CUSTOMERS VALUE **FREE DELIVERY AND PRODUCT ACCESS** MORE THAN EXISTING ONLINE GROCERY CONSUMERS DO

1. Includes buy online and pick up in store.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866)

For eCommerce retailers and brands, this is a unique moment to connect directly with consumers who are broadening their shopping and purchasing behavior

ONLINE PRODUCT SEARCH INITIATION BY CHANNEL, U.S., 2019 VS. 2020, % ONLINE SHOPPERS AGED 18-64

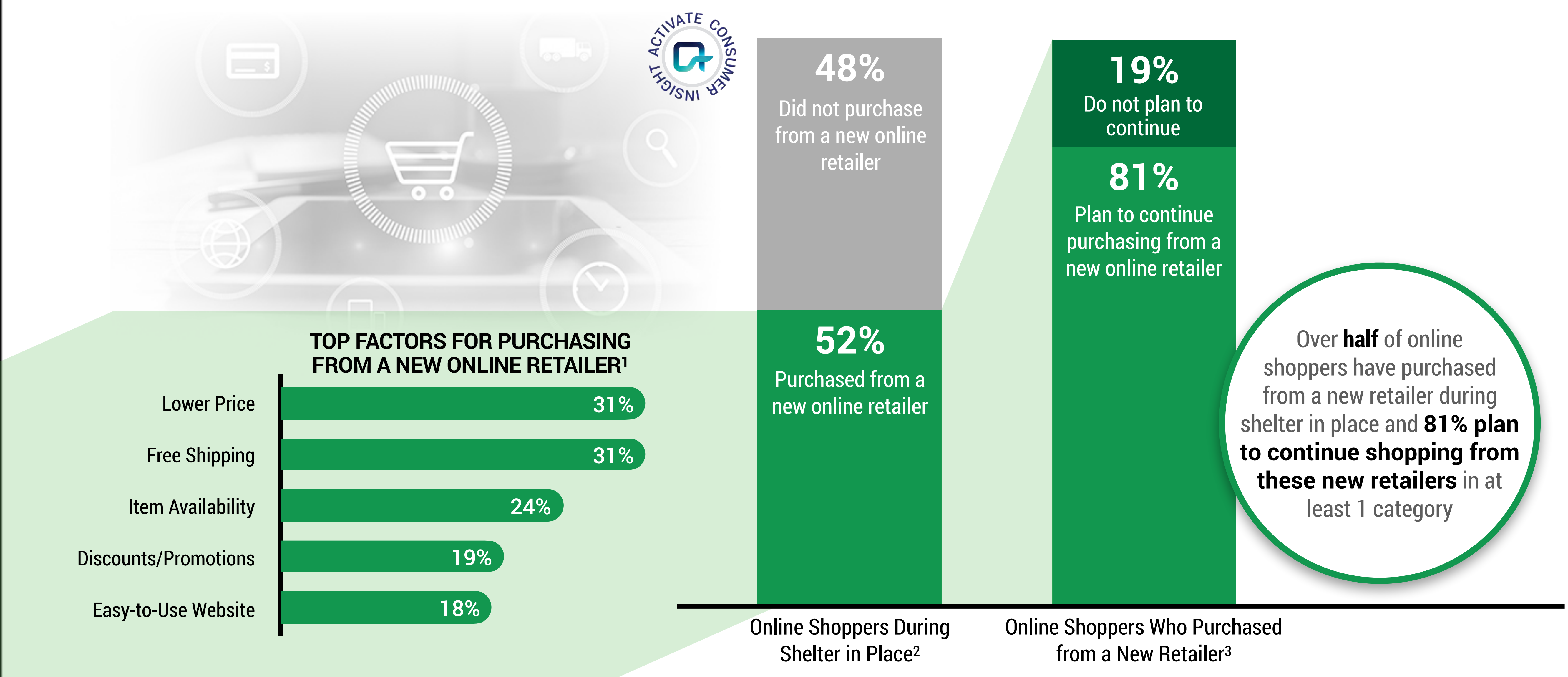


YEAR/YEAR INCREASE IN USERS AND SITE PAGE VIEWS, U.S., APR 2019 VS. APR 2020

1. "Other" can include: additional online marketplaces, buying directly from brand/retailer website, and social media.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866), CivicScience, Comscore

Post-reopening, eCommerce retailers and brands can sustain consumers' interest and their intent to continue to shop/buy from new sites

CONSUMER PURCHASING BEHAVIOR FROM NEW ONLINE RETAILERS[1] DURING SHELTER IN PLACE
U.S., 2020, % ADULTS AGED 18-64 WHO HAVE PURCHASED ONLINE DURING SHELTER IN PLACE



1. "New Online Retailer" refers to an online retailer that the consumer had never shopped at before shelter in place.
2. Consumers aged 18-64 who have purchased a product online in at least one category since shelter in place.
3. Consumers who have purchased from a new online retailer in at least one category since shelter in place.

Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925)

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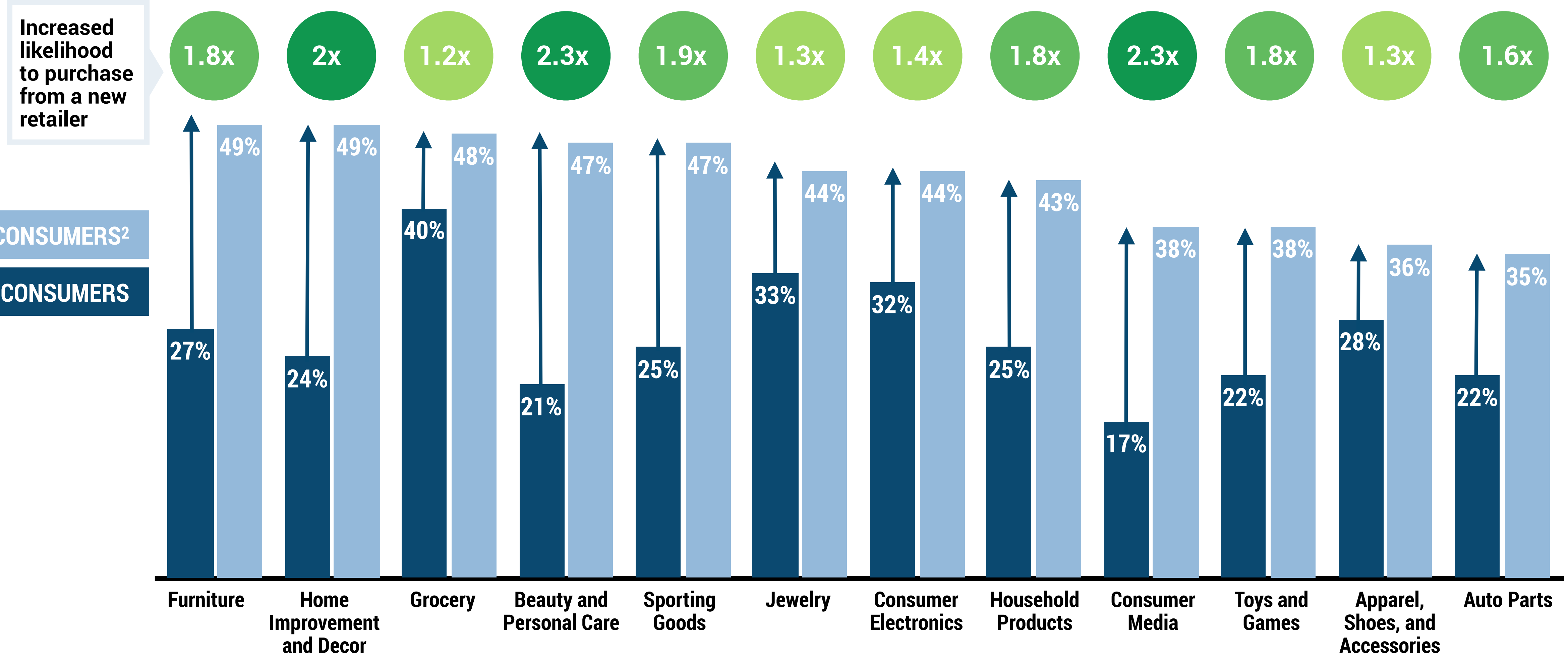
The highest value Super Consumers are more likely to extend their purchases beyond today's top eCommerce sites

LIKELIHOOD TO PURCHASE FROM NEW ONLINE RETAILERS[1] DURING SHELTER IN PLACE BY SHOPPER TYPE AND PRODUCT CATEGORY, U.S., 2020, % ADULTS AGED 18-64 WHO HAVE PURCHASED FROM THE CATEGORY DURING SHELTER IN PLACE

Across all categories, customers who shop the most frequently and spend the most money are more likely to have purchased from a new online retailer

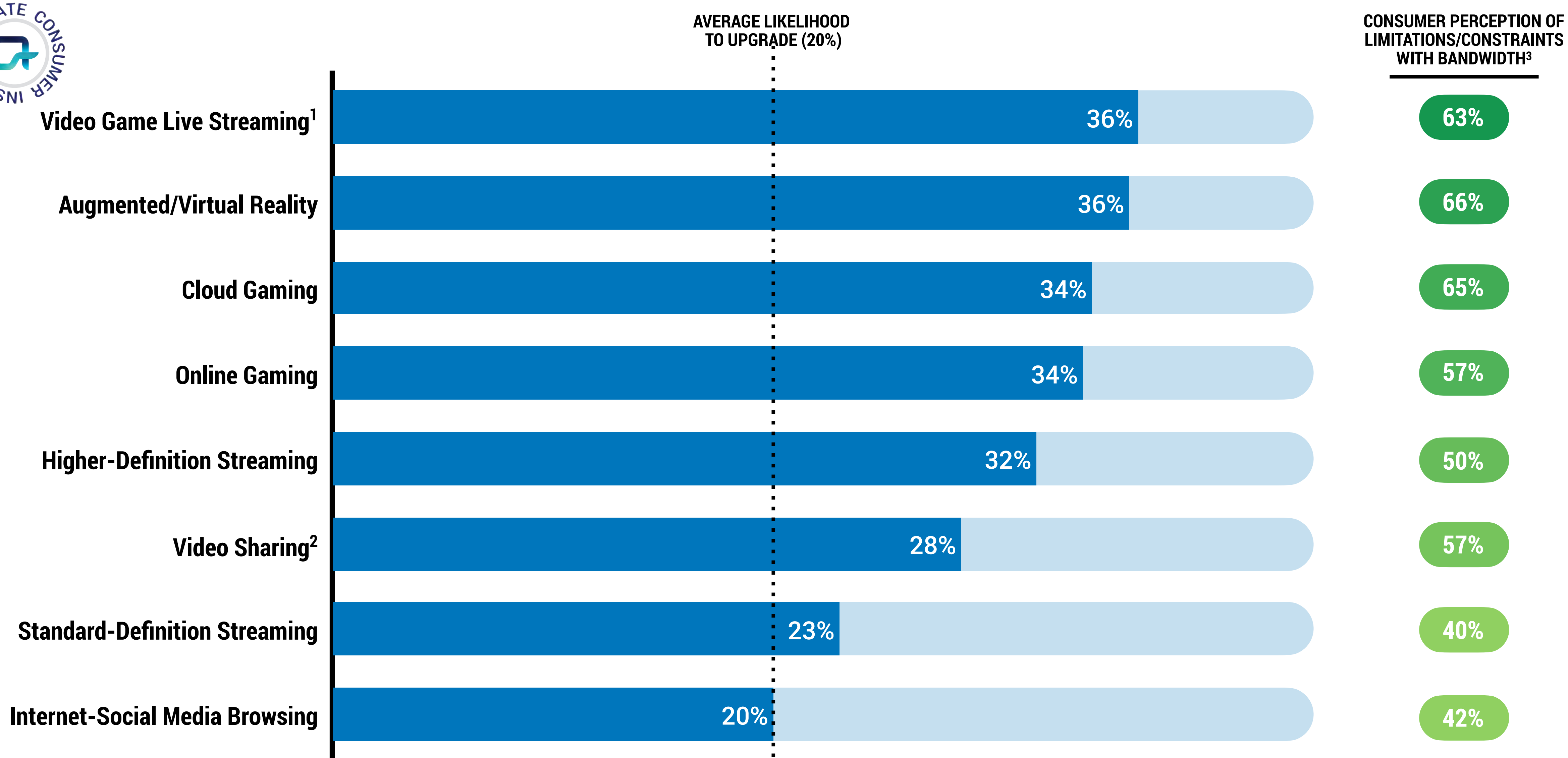


1. "New Online Retailer" refers to an online retailer that the consumer had never shopped at before shelter in place.
2. "Super Consumers" are online shoppers in the top 30% (i.e. 70th percentile) based on average purchase size and frequency of online shopping in each category before shelter in place.

Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925)

Increased technology and media usage will motivate a new wave of competition among connectivity providers as consumers will seek to upgrade internet service providers – fixed and mobile

LIKELIHOOD TO CHANGE HOME INTERNET SERVICE PROVIDERS BY SELECT ONLINE ACTIVITIES, U.S., 2020, % CONSUMERS AGED 18+ WITH INCREASED USAGE OF EACH ACTIVITY



1. Recording and broadcasting a live video stream of gaming content via YouTube, Twitch, Mixer, etc.
2. Excludes video game live streaming.
3. Percent of consumers aged 18+ who have performed the activity in the past and consider connection "slow/bad", "not great", or "could be better".

Sources: Activate analysis, Activate 2019 Consumer Tech & Media Research Study (n=4,006), Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866)

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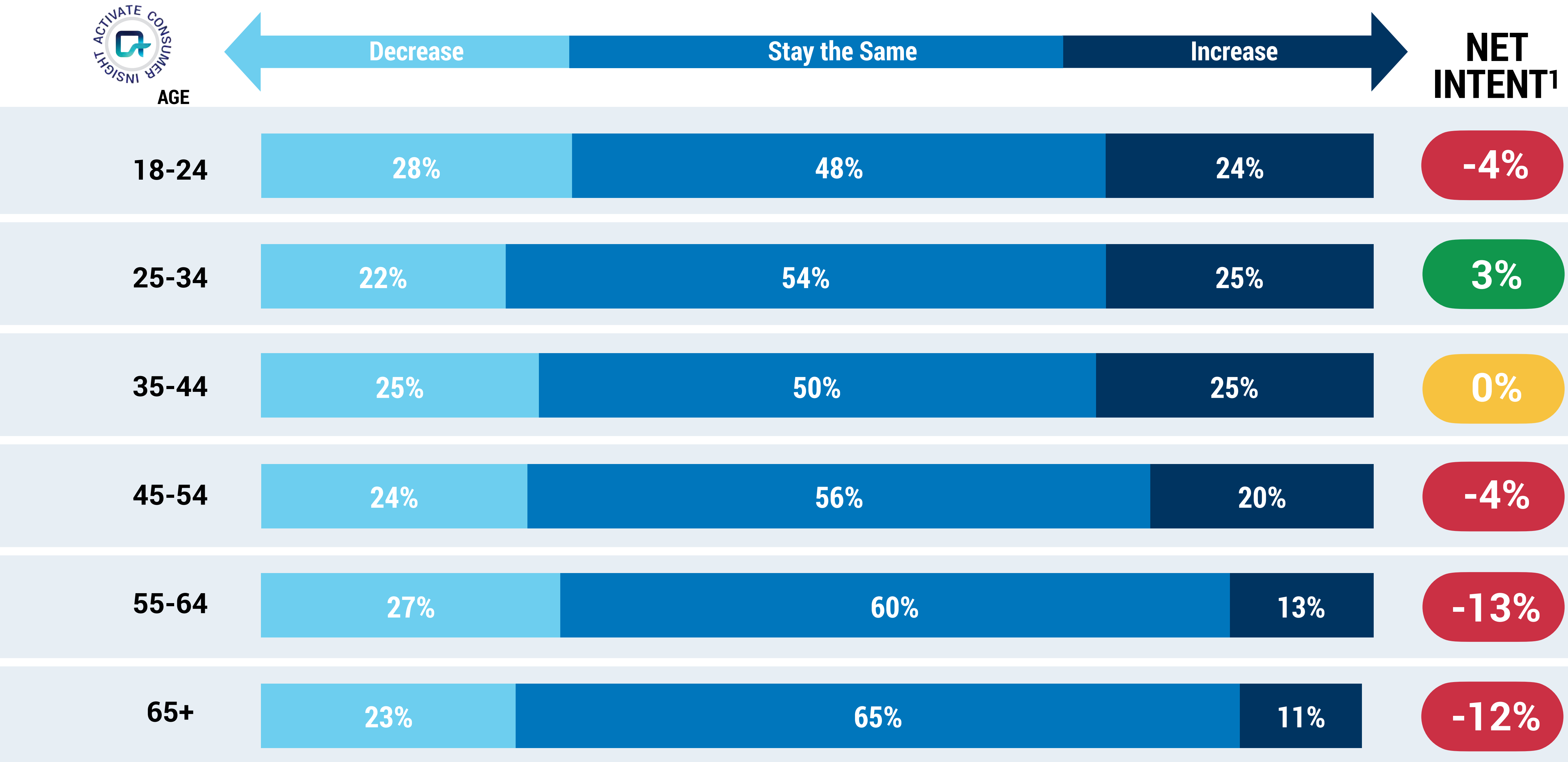
Connectivity providers will need to employ other value drivers (e.g. quality, price, services) as new devices will not drive carrier selection

LIKELIHOOD TO UPGRADE PERSONAL ELECTRONICS (E.G. MOBILE DEVICES) AFTER SHELTER IN PLACE,
U.S., 2020, % ADULTS AGED 18+



1. "Net Intent" defined as % increase minus % decrease.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866)

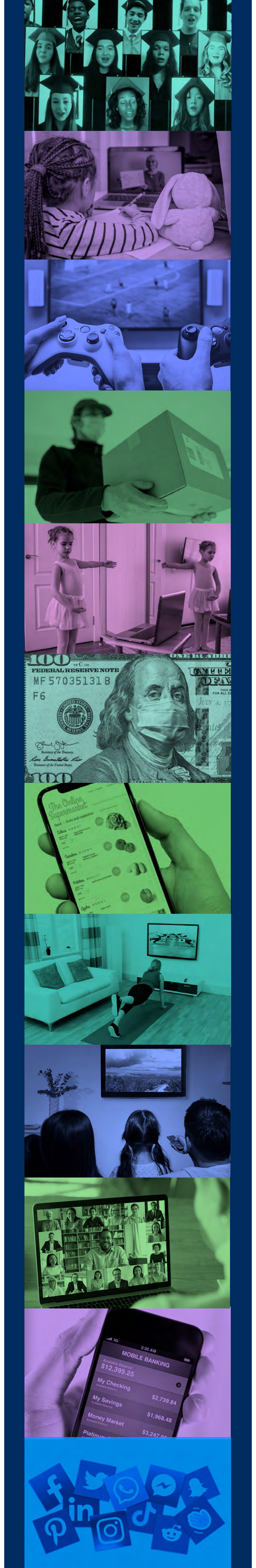
REWIRE TO RESTART

SUSTAIN INCREASED DEMAND

▶ **REACTIVATE AND ACQUIRE CUSTOMERS**

ACCELERATE NEW TECH EXPERIENCES

THE ACTIONABLE REWIRE TO RESTART AGENDA



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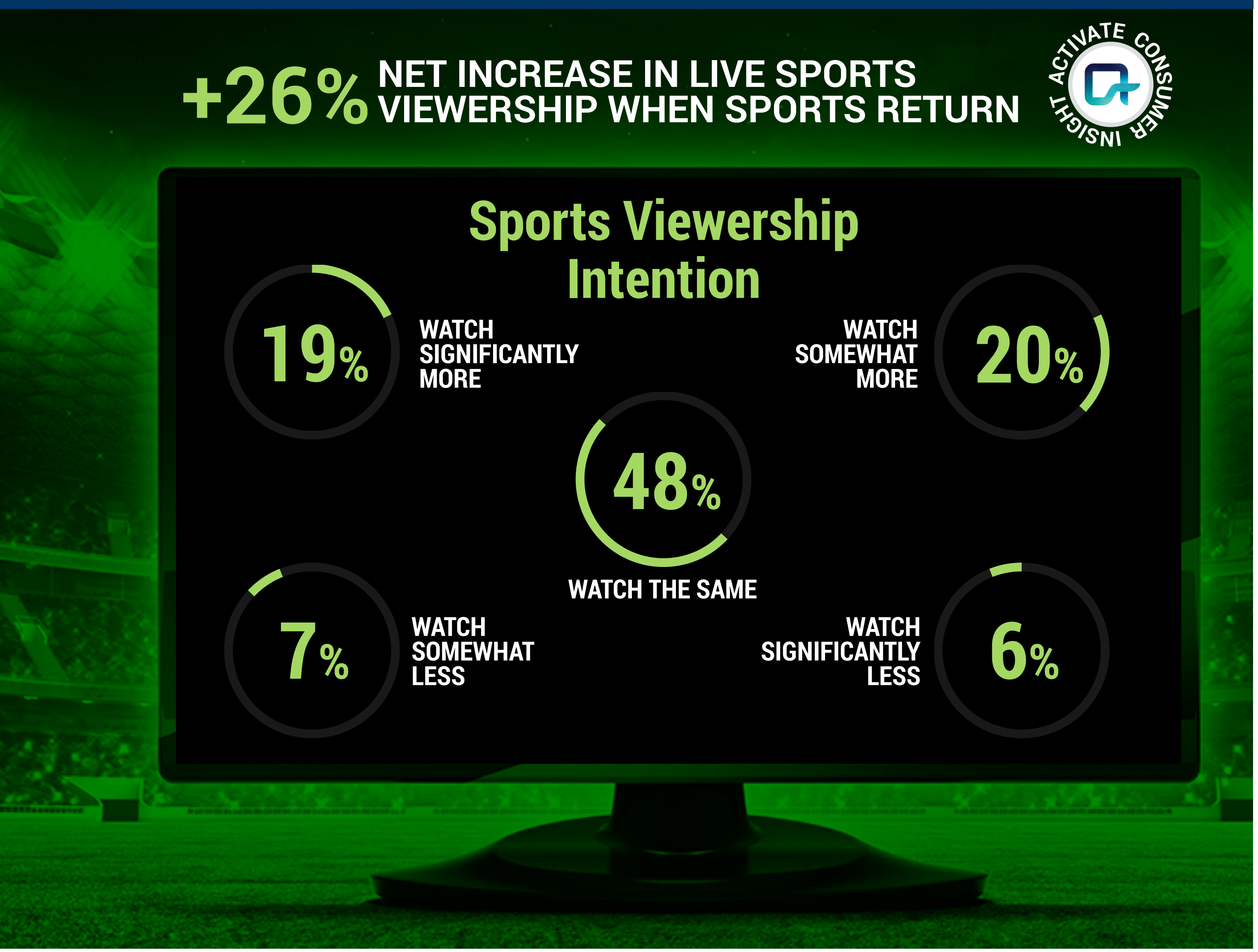
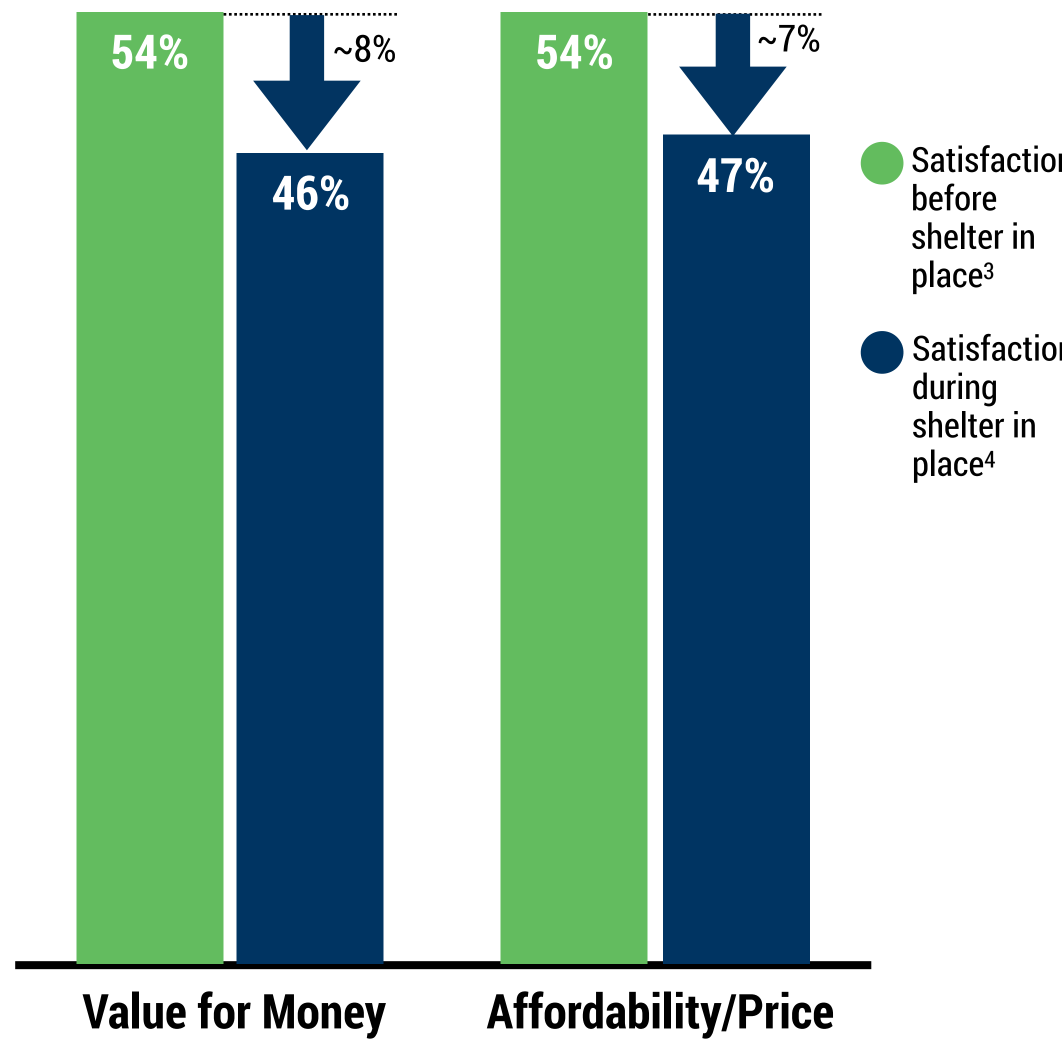
We forecast a 26% net increase in live sports viewership upon return; Pay TV providers will need to reestablish their value proposition and win back subscribers

VIEWERSHIP INTENTION ONCE LIVE SPORTS RETURN,
U.S., 2020, % SPORTS FANS[1] AGED 18-64



SATISFACTION[2] WITH PAY TV ATTRIBUTES,
U.S., 2019 VS. 2020,% PAY TV USERS AGED 18-64



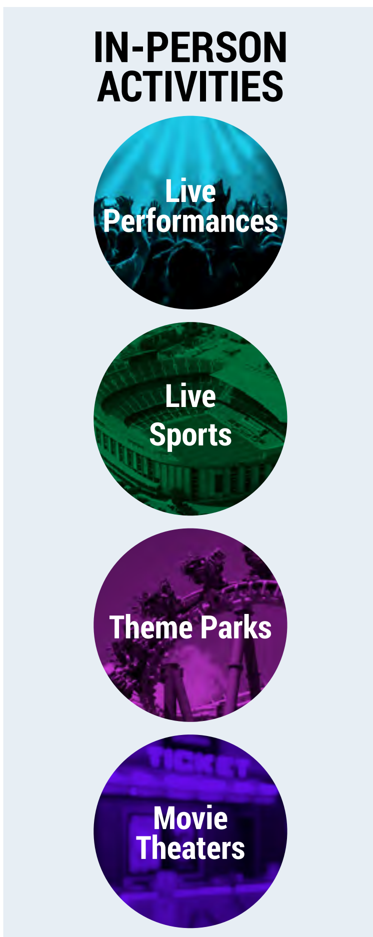
1. "Sports Fan" defined as anyone who watched a live sports event in the 12 months prior to shelter in place. 2. Pay TV users who indicate that they are "extremely" or "very" satisfied with the attribute. 3. Adults aged 18-64 with access to Pay TV (traditional and digital) in their household, surveyed in 2019. 4. Adults aged 18-64 with access to Pay TV (traditional and digital) in their household, surveyed May 2020.
Sources: Activate analysis, Activate COVID Consumer Tech & Media Viewpoint Study April 2020 (n = 1,866), Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925), Activate Video Consumer Survey December 2019 (n = 3,166)

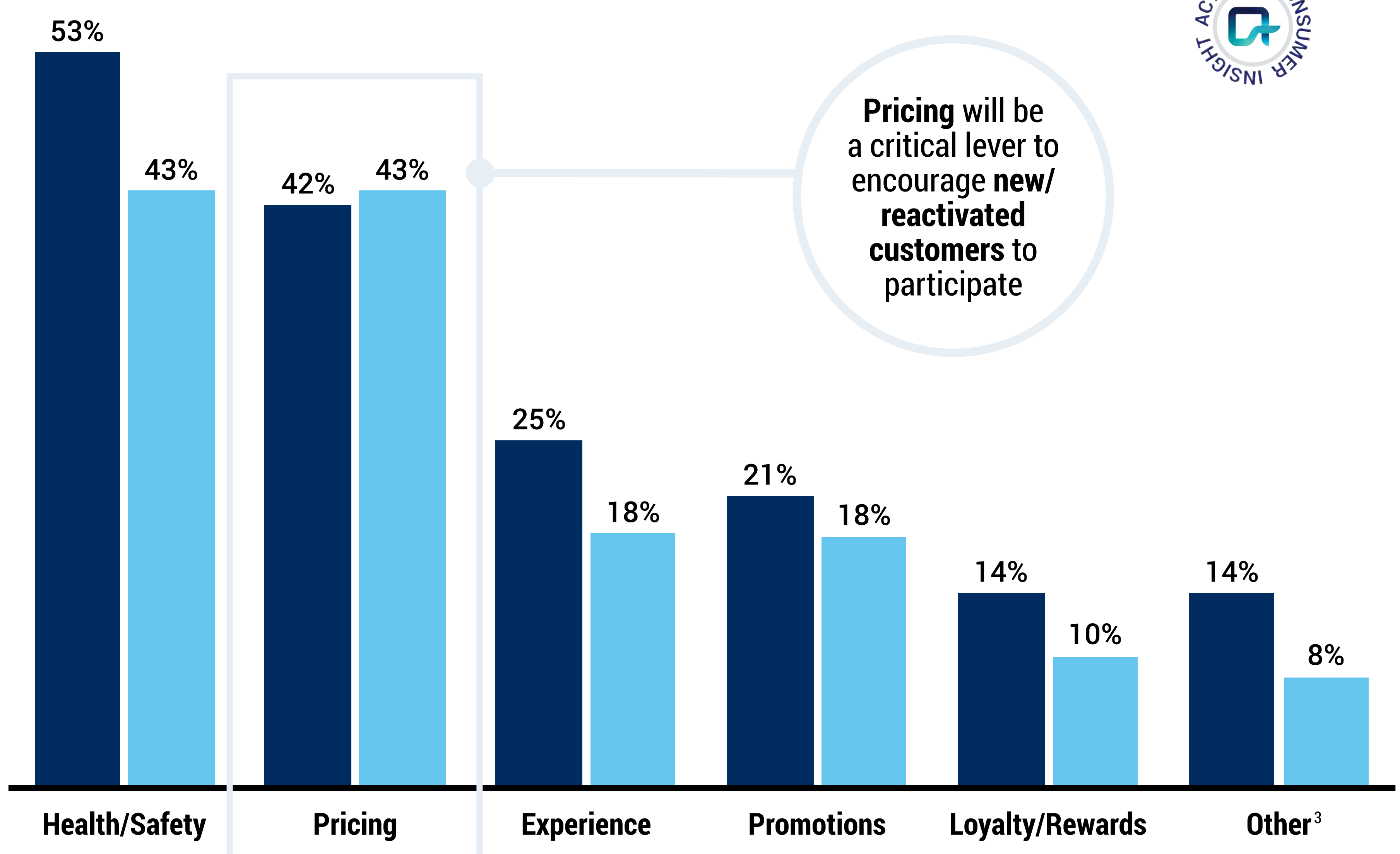
Once health and safety concerns have been addressed, pricing, experience, and promotions will be the most important triggers to win back core and reactivate lapsed customers to out-of-home activities

FACTORS THAT WOULD ENCOURAGE PARTICIPATION IN IN-PERSON ACTIVITIES, U.S., 2020, % CUSTOMERS AGED 18-64

CORE CUSTOMERS[1]

NEW/REACTIVATED CUSTOMERS[2]



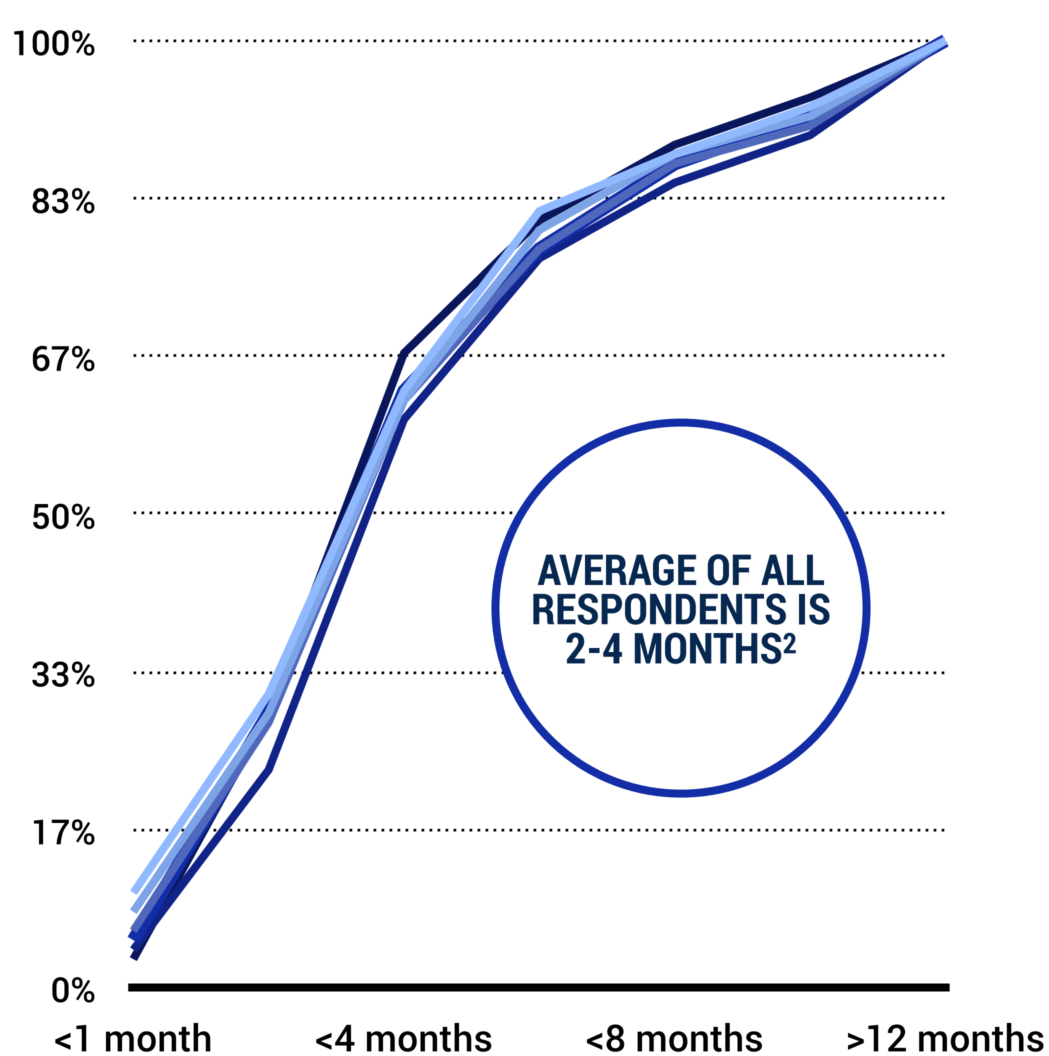


1. "Core Customers" participate in an activity at least once per year before shelter in place, and do not intend to stop participation in the activity upon reopening. 2. "New/Reactivated Customers" are not active participants but do intend to participate upon reopening.
3. Includes "public and employee good" (i.e. donations to charity, consideration for health and safety of employees). 4. Live performances includes live concert or theatrical events (e.g. comedy show, music festival, opera, Broadway).
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study May 2020 (n = 1,925)

The restart of out-of-home activities will be led by younger demographics; how will companies target this group while maintaining their connection with other segments?

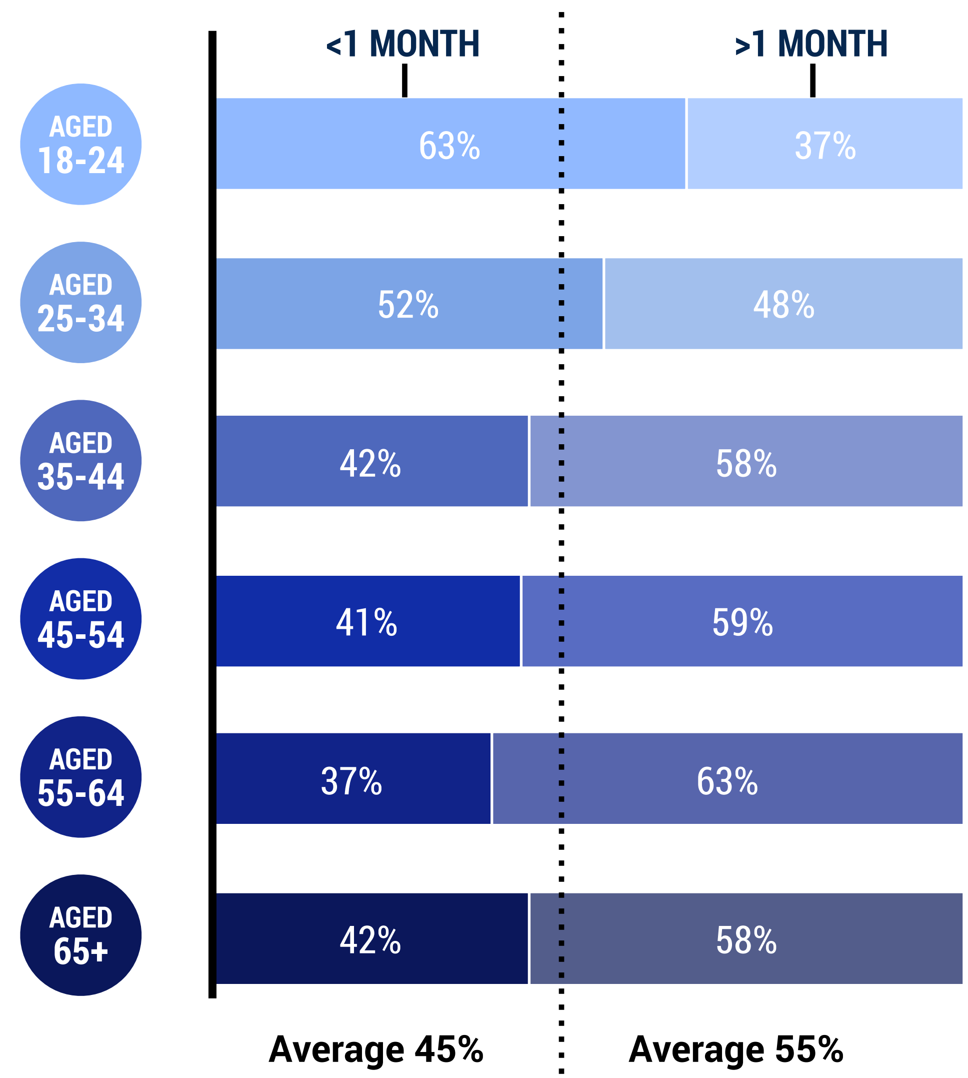
EXPECTATION OF FULL RECOVERY FROM EFFECTS OF COVID-19, U.S., 2020, % ADULTS AGED 18+

RECOVERY EXPECTATIONS ARE SIMILAR ACROSS ALL AGE GROUPS…



EXPECTATION OF RETURN TO NORMAL ROUTINES[1] AFTER RECOVERY, U.S., 2020, % ADULTS AGED 18+

…HOWEVER RETURN TO NORMAL ROUTINES WILL BE LED BY YOUNGER DEMOGRAPHICS



Younger consumers are likely to return to their normal routines **within a month** of shelter in place ending

Consumers aged 55+ are likely to return to their normal routines **over a month** after the end of shelter in place

1. "Normal Routines" defined as socializing in-person with your friends and family, returning to work/school full-time at your place of work/school, and going to bars and restaurants.
2. From date of response, April 2020.

Sources: Activate analysis, Activate COVID Consumer Tech & Media Viewpoint Study April 2020 (n = 1,866)

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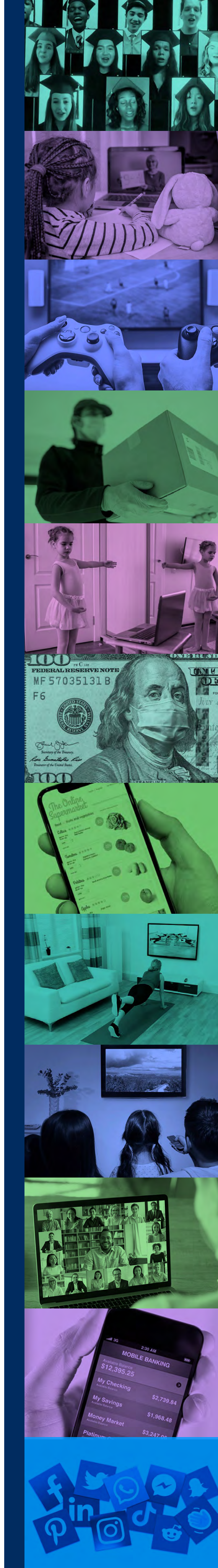

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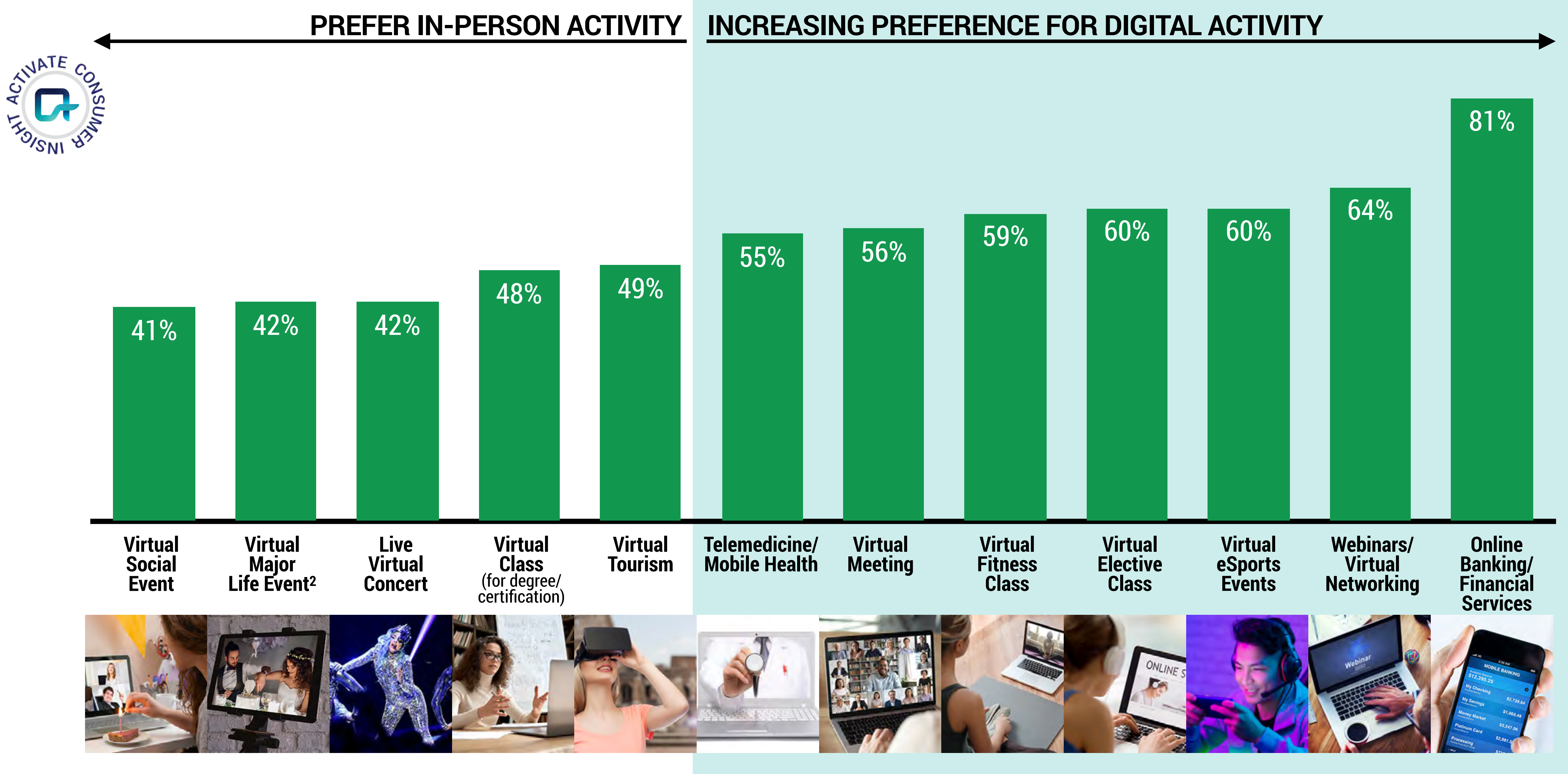
The transition to many digital activities has accelerated during shelter in place as consumers see them as better alternatives to in-person; this will be an investment imperative for technology and media companies

PREFERENCE FOR DIGITAL ACTIVITY OVER IN-PERSON ACTIVITY[1], U.S., 2020,
% ADULTS AGED 18-64 WHO HAVE PARTICIPATED IN THE DIGITAL ACTIVITY

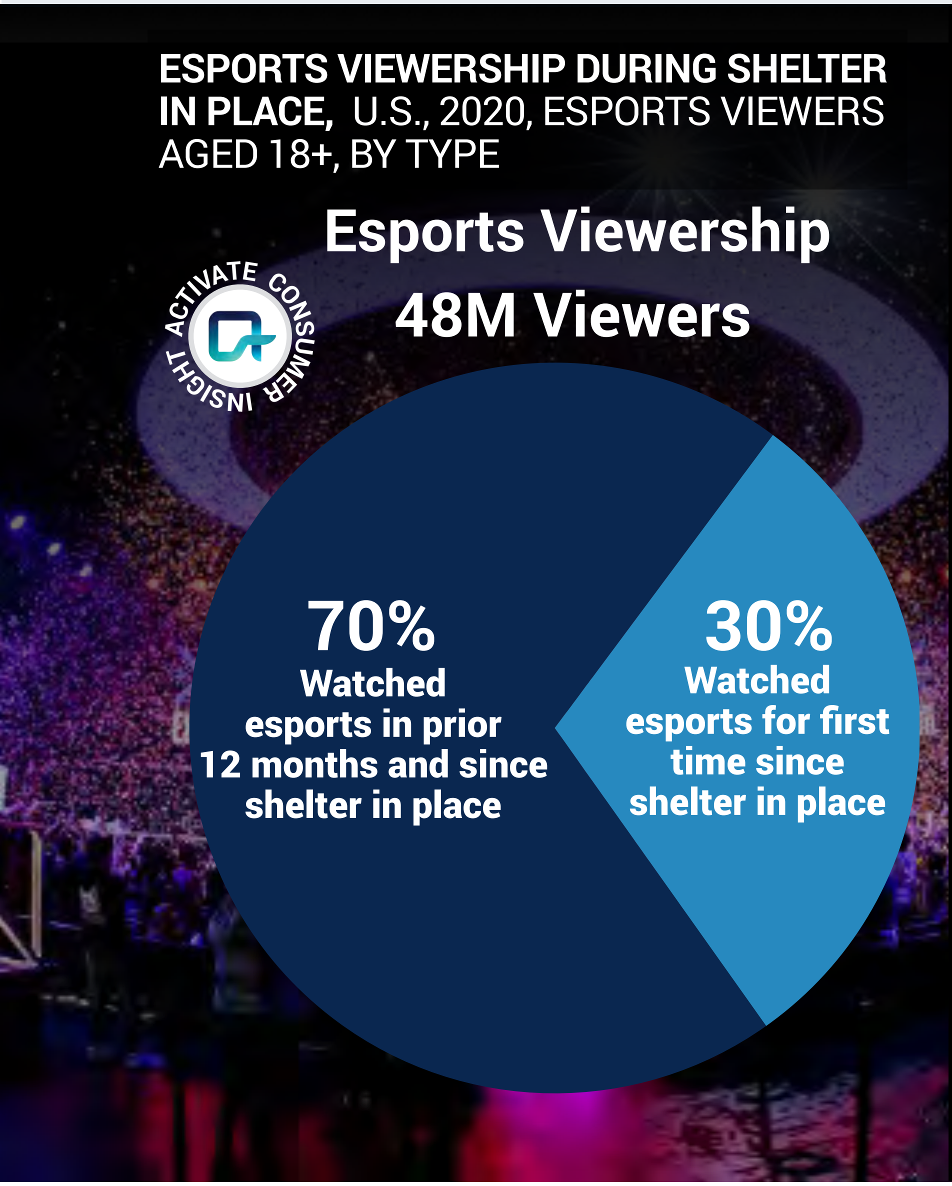


1. View digital activity as same as or better than the in-person equivalent.
2. "Virtual Major Life Event" can include virtual wedding, graduation, memorial service, etc.
Sources: Activate analysis, Activate Consumer Tech & Media Viewpoint Study May 2020 (n = 1,925)

Esports needs to be a priority focus for tech and media companies as 30% of viewers during shelter in place are new which shows an expansion beyond the historical core audience

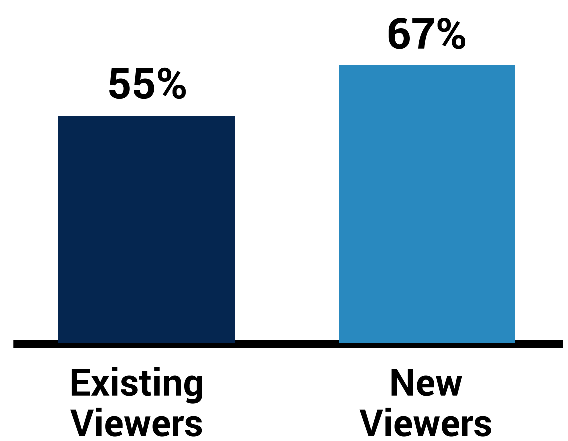
~30% OF ESPORTS VIEWERS ARE NEW…

ESPORTS VIEWERSHIP DURING SHELTER IN PLACE, U.S., 2020, ESPORTS VIEWERS AGED 18+, BY TYPE

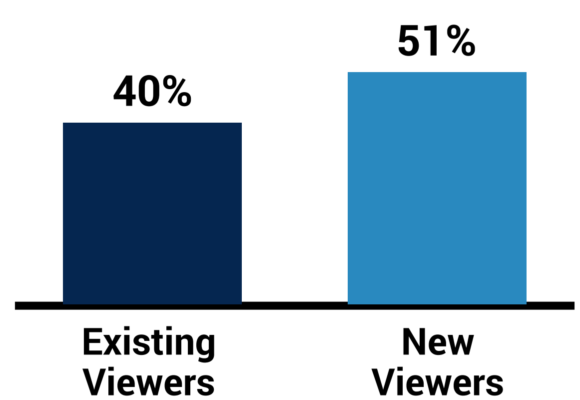


…DEMOGRAPHICS OF NEW USERS LOOK DIFFERENT THAN EXISTING USERS…

% ESPORTS VIEWERS AGED 35+



% ESPORTS VIEWERS WHO ARE NON-PC/CONSOLE GAMERS



…ESPORTS EVENTS HAVE BEEN REPLACEMENTS FOR PHYSICAL SPORTS EVENTS AND ACTIVITIES

NASCAR's iRacing Series has aired multiple races on FOX that have each averaged **over 1 million viewers** since shelter in place began

An NBA 2K Tournament pitted **real-life NBA stars** such as Kevin Durant and Devin Booker against each other — games averaged ~400K viewers on **ESPN2**

ESPORTS GAMBLING

Esports gambling has seen a **40x** increase in volume from March to April driven primarily by betting on sports games (e.g. **FIFA** and **NBA 2K**)

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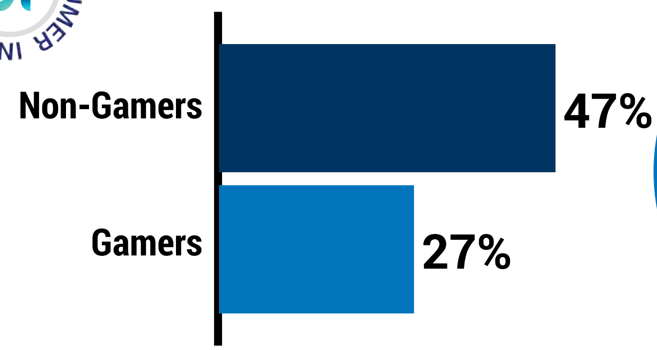
Sources: Activate analysis, Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866), Forbes, Odds Matrix, Sports Media Watch

The phenomenon of games replacing traditional social media platforms has accelerated during shelter in place – games have now become the platform for social events and connections

GAMERS ARE INCREASING THEIR USE OF SOCIAL MEDIA AT HALF THE RATE OF NON-GAMERS…

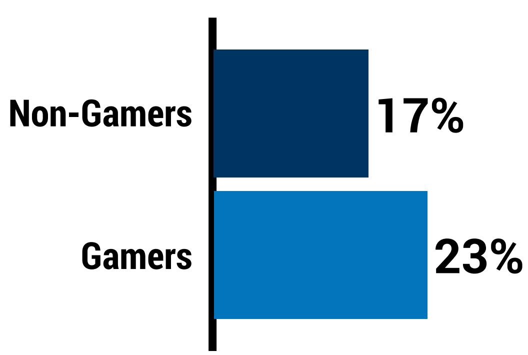
INCREASE IN SOCIAL MEDIA USAGE DURING SHELTER IN PLACE, % ADULTS AGED 18-64



Gamers have **increased their social media** usage at **0.6x** the rate of non-gamers

…YET ARE FEELING MUCH MORE CONNECTED TO THEIR FRIENDS AND COMMUNITIES…

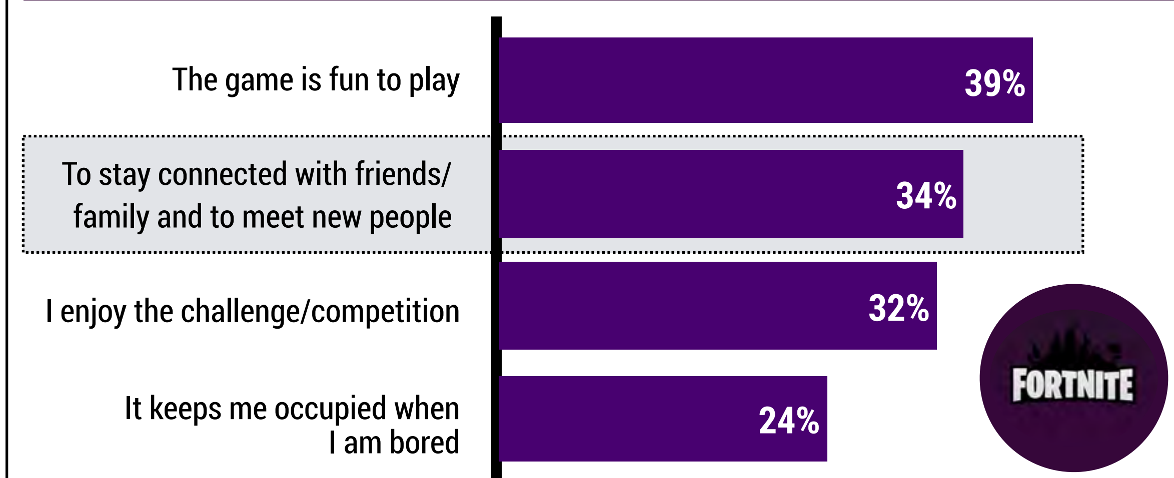
INCREASE IN FEELINGS OF SOCIAL CONNECTEDNESS DURING SHELTER IN PLACE, % ADULTS AGED 18-64



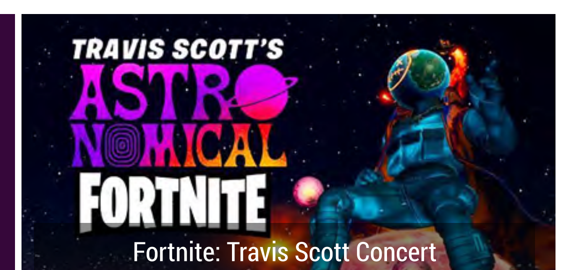
Gamers are **1.4x** more likely to feel **more connected** during social distancing than non-gamers

…AS USERS PLAY VIDEO GAMES FOR SOCIAL CONNECTIONS – SOCIAL MECHANICS ARE BEING BUILT INTO GAMES

PRIMARY REASONS FOR USING FORTNITE, U.S., 2019, % USERS AGED 18+

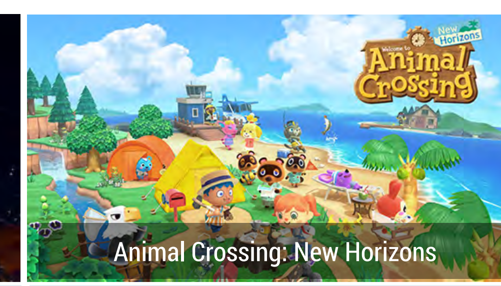


SOCIAL EVENTS AND CONNECTIONS



Fortnite: Travis Scott Concert

Travis Scott's in-game ***Astronomical*** tour drew 12.3M concurrent gamers during the first of 5 show dates



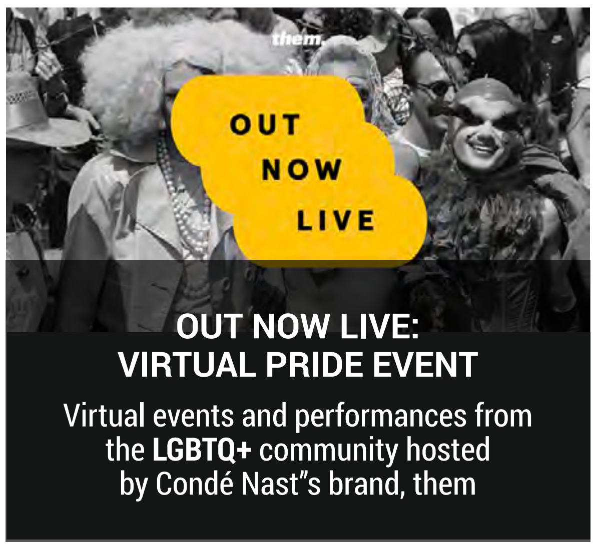
Animal Crossing: New Horizons

Animal Crossing fans have used the platform for a number of new social use cases including wedding ceremonies, graduations, and online dating

Sources: Activate analysis, Activate COVID Consumer Tech & Media Study April 2020 (n = 1,866), Activate Consumer Tech & Media Viewpoint Study May 2020 (n = 1,925), Activate 2019 Consumer Tech & Media Research Study (n = 4,006), Epic Games

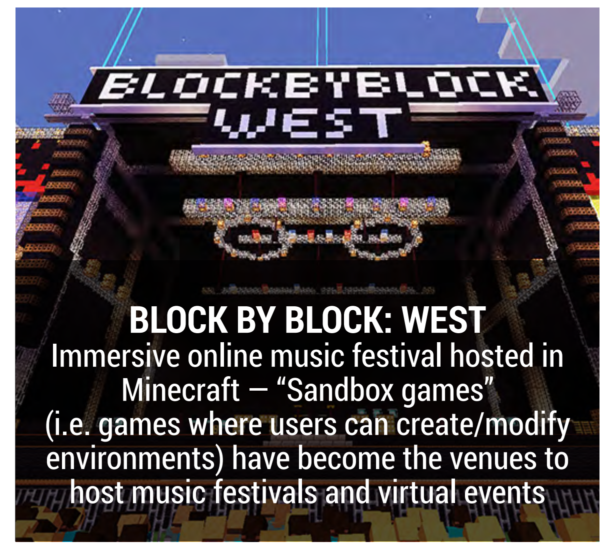
The unprecedented innovation in events during shelter in place will create lasting new formats and platforms for digital experiences

EXAMPLE EVENTS/EXPERIENCES DURING SHELTER IN PLACE



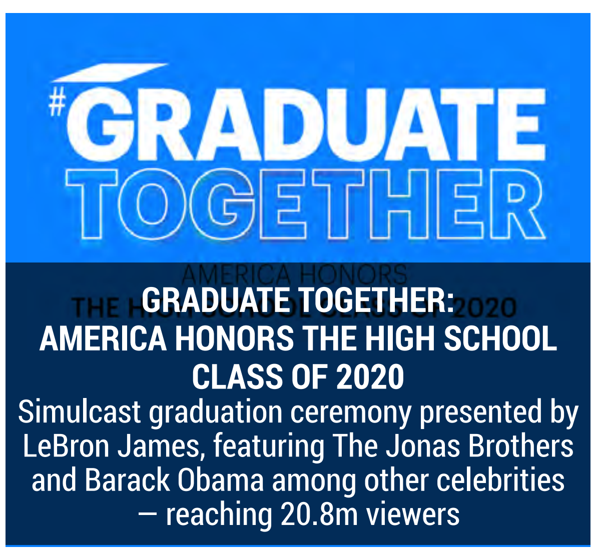
OUT NOW LIVE: VIRTUAL PRIDE EVENT
Virtual events and performances from the **LGBTQ+** community hosted by Condé Nast"s brand, them

ONE WORLD: TOGETHER AT HOME
Global Citizen and the WHO collaborated with artists for a global virtual concert, raising $128m for COVID-19 relief

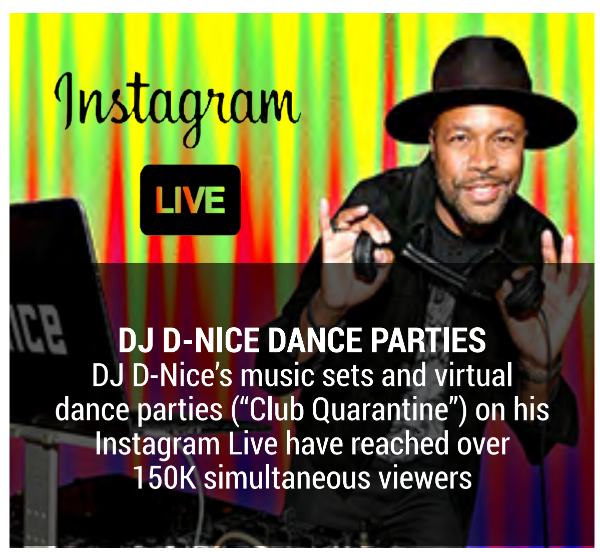


BLOCK BY BLOCK: WEST
Immersive online music festival hosted in Minecraft – "Sandbox games" (i.e. games where users can create/modify environments) have become the venues to host music festivals and virtual events

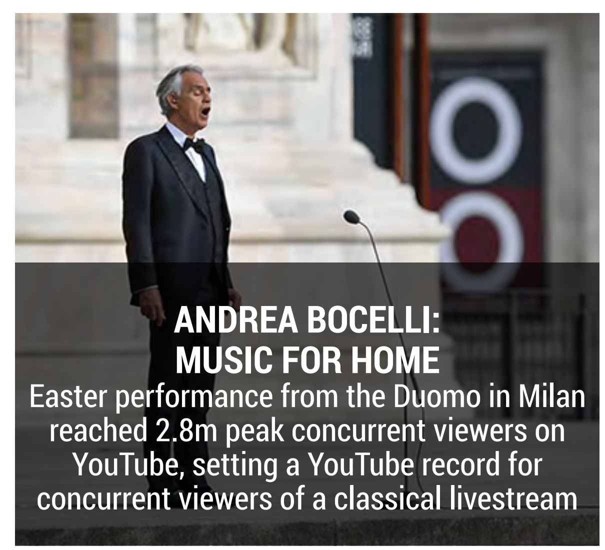
VERIZON'S PAY IT FORWARD LIVE
Weekly live-streaming celebrity series featuring musical performances and video game competitions to support America's small businesses – reaching 70M+ total live-stream views



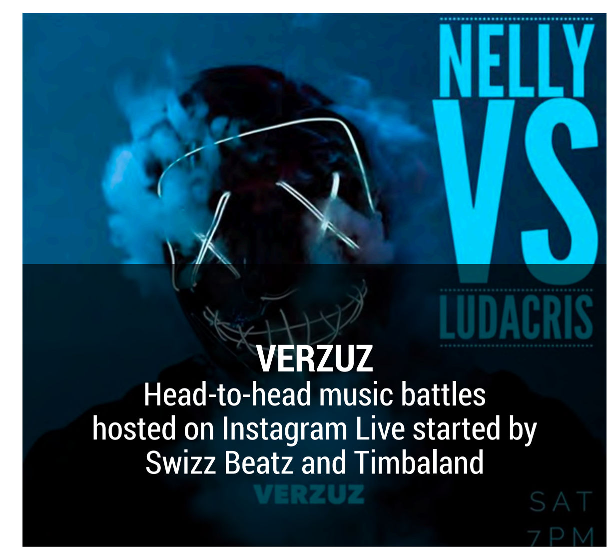
GRADUATE TOGETHER: AMERICA HONORS THE HIGH SCHOOL CLASS OF 2020
Simulcast graduation ceremony presented by LeBron James, featuring The Jonas Brothers and Barack Obama among other celebrities – reaching 20.8m viewers



DJ D-NICE DANCE PARTIES
DJ D-Nice's music sets and virtual dance parties ("Club Quarantine") on his Instagram Live have reached over 150K simultaneous viewers



ANDREA BOCELLI: MUSIC FOR HOME
Easter performance from the Duomo in Milan reached 2.8m peak concurrent viewers on YouTube, setting a YouTube record for concurrent viewers of a classical livestream



VERZUZ
Head-to-head music battles hosted on Instagram Live started by Swizz Beatz and Timbaland

Sources: Activate analysis, Deadline, GQ, Rolling Stone, Nielsen, Variety, Spin

Experience innovations during Covid-19 will mean new socially connected activities while blurring the lines between physical and digital

TECH-ENABLED GROUP ACTIVITIES

GROUP GAMES AND HANGOUTS

Face-to-face social media services that allow users to play games together

Example services:

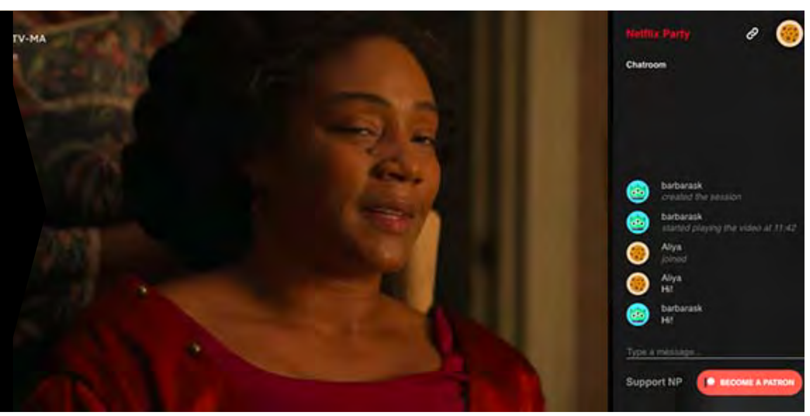
jackbox games Houseparty

WATCH PARTIES

Synchronize streaming video with groups, with chatting features to enable long distance watching

Example services:

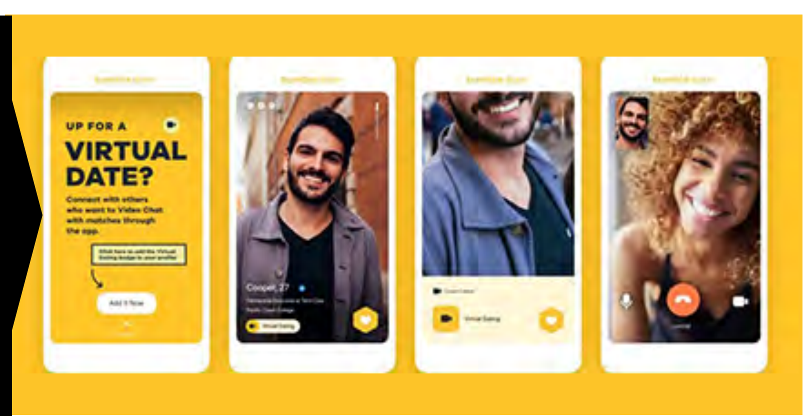
NP NETFLIX PARTY hulu WATCH scener



VIRTUAL DATING

Dating apps such as Bumble and Match have added features and functionalities to facilitate virtual dating (e.g. a badge to add to your profile indicating you are up for a virtual date)

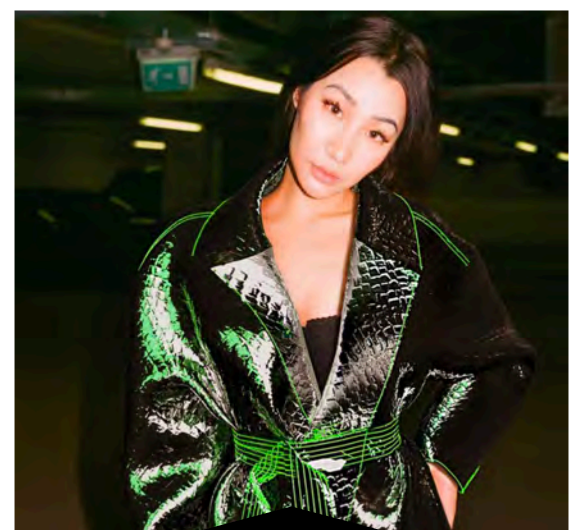
bumble match



EVOLUTION OF THE VIRTUAL SELF

STUDENTS ARE USING MINECRAFT TO VIRTUALLY REBUILD THEIR CAMPUSES

Berkeley University of California | Boston University | Brown | MIT | Penn | Stanford University | UCLA | University of Washington



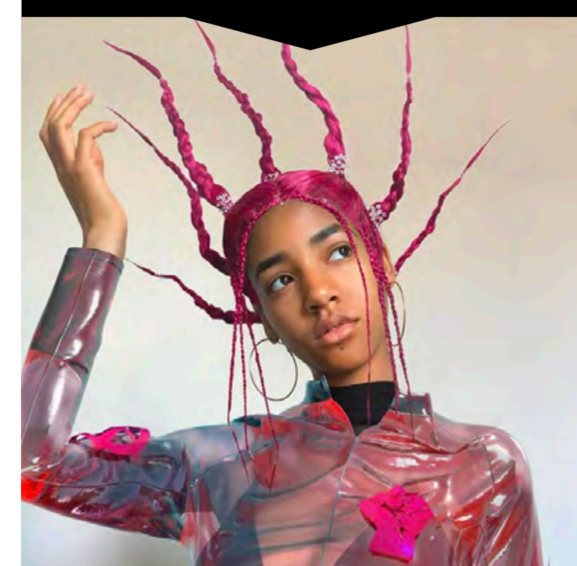
CONTACTLESS FASHION

Cyber fashion purchased or custom, existing in the virtual space only. Photo fitted-to-order and digitally delivered to the customer.

Example service: TRIBUTE BRAND

CONTACTLESS HAIRDRESSING

CGI hairstyles by @evaniefrausto custom styled to your image for innovative hair in the virtual world



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Sources: Activate analysis, Company Sites, Instagram

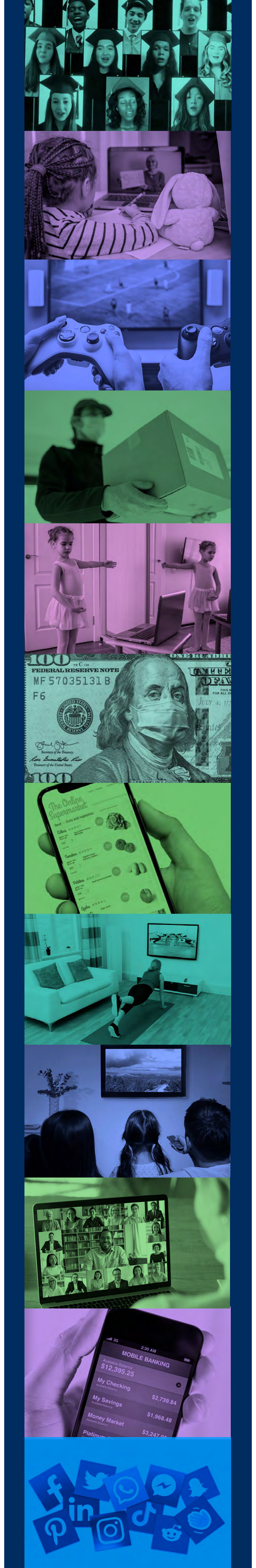
REWIRE TO RESTART

SUSTAIN INCREASED DEMAND

REACTIVATE AND ACQUIRE CUSTOMERS

ACCELERATE NEW TECH EXPERIENCES

▶ **THE ACTIONABLE REWIRE TO RESTART AGENDA**



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The Activate Rewire to Restart Agenda

- Identify new acquisition opportunities
- For private equity investors: identify value creation opportunities that will be defensible in the new post-Covid environment
- Pursue growth investments

- New advertisers and categories to align with people's technology and media consumption, buying behavior, and expectations post Covid
- Re-package linear and digital
- Rebalance marketers' needs for upper funnel and performance vehicles
- Help marketers identify their best customers

- Sustain increased demand generated during Covid: retain customers, extend purchases, and merchandise competitively
- Focus on acquiring and retaining highest value Super Consumers
- Go aggressive to stand up new offerings

- Accelerate and capitalize on new behaviors established during Covid (e.g. telemedicine, social viewing experiences)
- Build or acquire essential technology-based businesses and capabilities
- Get future ready: gain insight into consumers' new usage, engagement, shopping patterns, and shared social consumption

- Align with consumers' changed expectations, engagement, and shopping (current and new)
- Sustain increased levels of demand for technology and media experiences, shopping, and new digital behaviors (e.g. video, gaming, shopping, esports)
- Reignite demand for activities and purchases adversely impacted during shelter in place (e.g. out-of-home, mobile device purchases, PayTV)
- Gain insight into consumers' new value drivers

- Design new pricing programs to sustain and broaden demand levels during Covid
- Capitalize on consumers' willingness to pay, driven by increased levels of activity
- Price promotions to trigger and re-engage (e.g. out-of-home activities)
- Capture value from new digital services
- Retain and grow eCommerce share through competitive pricing

- Align with consumers' shifted media consumption activities and the factors that influence their intent and purchases
- Assess and test: engage in new marketing programs, vehicles and channels for effectiveness and efficiency
- Design marketing programs based on segment-based approaches
- Identify, target and retain Super Consumers

How Activate Consulting can help: our full set of capabilities to execute the Rewire to Restart Agenda

ACTIVATE'S CAPABILITIES

GROWTH STRATEGY

Define strategies to position companies and businesses for growth, exploit new opportunities, take advantage of the innovation, platforms, businesses, content, and technology reshaping these industries. Build strategic roadmaps and major initiatives.

DIGITAL STRATEGY

Formulate strategies to transform companies, identify digital acquisitions, and build technology-enabled businesses, experiences, and functionality.

STRATEGIC DUE DILIGENCE AND VALUE CREATION FOR PRIVATE EQUITY INVESTORS

Evaluate all strategic elements of potential target (e.g. customer, market, consumer research, target capabilities, positioning, underlying trends). Identify and size specific opportunities to improve performance. Plan for post-acquisition value capture.

MARKETING EFFECTIVENESS

Optimize marketing programs to effectively use all vehicles for customer acquisition, retention, traffic, engagement, and activation, maximizing marketing ROI. Target granular customer segments via performance campaigns and ensure performance.

PRICING

Develop new pricing structures and strategies to grow revenues from consumers and customers. Areas of expertise include: subscription, eCommerce, payments, digital marketplaces, ticketing, B2B information, advertising, cloud services, SAAS, and freemium.

SALESFORCE EFFECTIVENESS: B2B AND ADVERTISING BUSINESSES

Position the sales force and capabilities to grow revenue share: organization, incentives and coverage model; yield and revenue management; new category and customer development.

CONSUMER INSIGHTS AND VOICE OF CUSTOMER

Determine consumer value, demand, and behavior drivers, to inform strategy, new product development, pricing, customer acquisition, merchandising, and marketing.

IMPLEMENTATION AND PROGRAM MANAGEMENT TO EXECUTE STRATEGY AND DELIVER PERFORMANCE IMPROVEMENT INITIATIVES

CREATED BY THE ACTIVATE CONSULTING TEAM:

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Activate Viewpoint:
Rewire to Restart