BBDO KNOWS COVID-19

CHARTING THE PANDEMIC

November 2020



During the pandemic, we have used multiple data sets and sources to help us navigate the unfolding events, glean insights and compile our reports.

We have also used data to map the key phases of the pandemic, and where possible we will use these phases throughout this presentation in order to provide a consistent reference and anchor point for the charts.

Please refer to the next page for the BBDO Knows COVID-19 phases framework:

BBDO KNOWS FRAMEWORK

Perceived normality decreasing



The human phases of the pandemic

PRE-	-COVID NOR	MAL	RAPID REAPPRAISAL	HOLDING	PATTERN	TEMPORAI	RY RESPITE	CONTINUC	CONTINUOUS (RE)ADJUSTMENT AUG SEP OCT		HOLDING PATTERN (AGAIN)
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV







LOCKDOWN

LIVING







NORMALITY

Life as we used to know it with a high yet manageable level of uncertainty



PANDEMIC DECLARED

Lockdown

measures

enforced

across multiple

markets

Everybody moves online & new routines established



LIVING WITH COVID

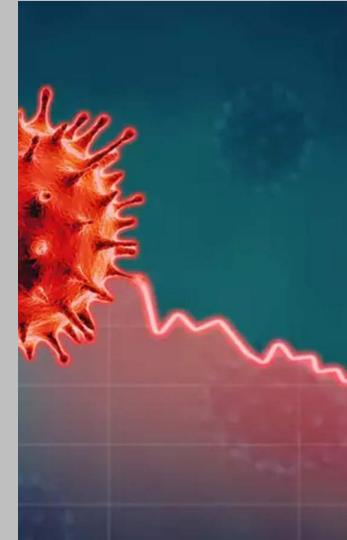
LOCKDOWN LIVING V2.0

Restrictions tightening in many market, move back to some form of lockdown.

People more equipped and experienced this time round.

CHARTING THE PANDEMIC

- 1. Charting the virus
- 2. Charting the economy & business
- 3. Charting sentiment & behaviour
- 4. Charting brand spend & response



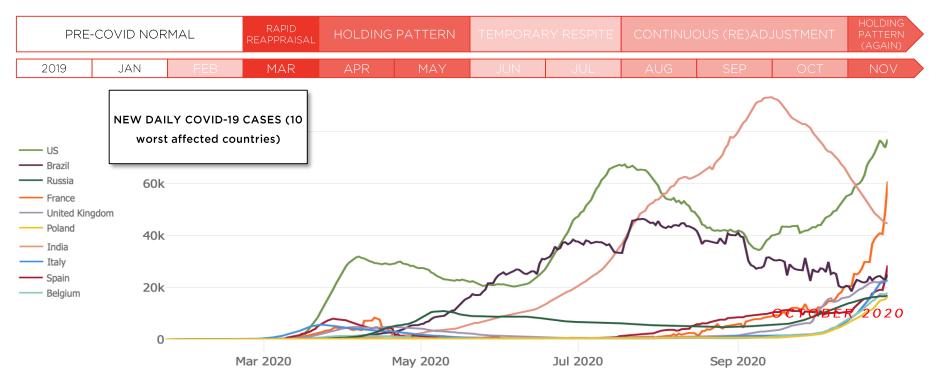


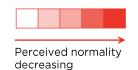
The scale of the virus was so far reaching that its impact could be seen and charted across multiple measures.

With unparalleled results:

BBDOKNOWS UNIQUE AND UNPARALLELED TRAJECTORIES

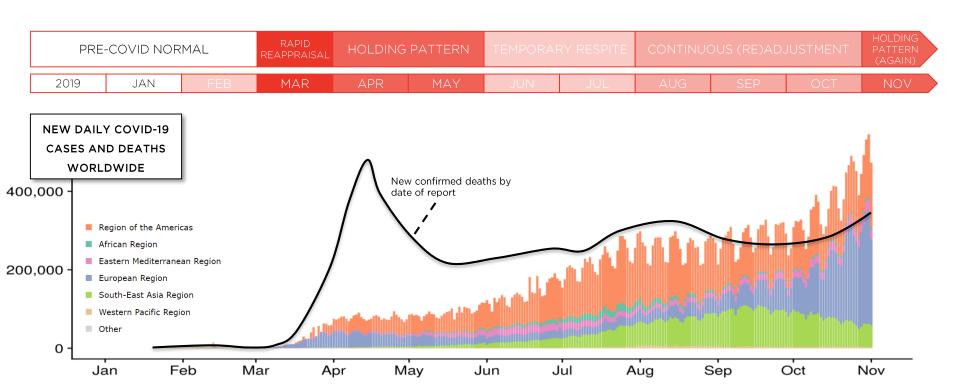
Each market has its own COVID story





BBDOKNOWS UNPARALLELED SPEED OF IMPACT

Globally, growth in cases continues accelerating



Q1-1996

UNPARALLELED UNCERTAINTY AND ECONOMIC IMPACT

No previous pandemic caused such level of uncertainty and economic impact Coronavirus 2020 This index measures uncertainty related to pandemics across the globe. The index is a simple average for 143 countries. PANDEMIC UNCERTAINTY INDEX VS. 6 % **REAL GDP GROWTH** 20 Real GDP growth, global, % 2 -2 SARS 2002-03 Ebola Avian flu 2014-16 2003-09 Swine flu 2009-10 Bird flu **MERS** World Pandemic Uncertainty Index 2013-17 2014-20

Q1-2010

Q3-2013

Q1-2017

Q3-2006

-6

Q3-2020

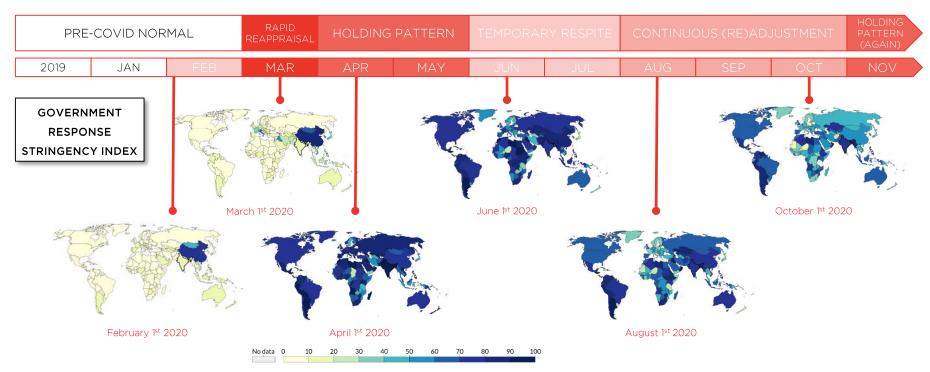
Q1-2003

Q3-1999



BBDOKNOWS UNPARALLELED GOVERNMENT RESPONSE

Strictness in curtailing measures fluctuated monthly



This is a composite measure based on nine response indicators including school closures, workplace closures, and travel bans, rescaled to a value from 0 to 100 (100 = strictest). If policies vary at the subnational level, the index is shown as the response level of the strictest sub-region.

BBDO KNOWS A GLOBAL TIMELINE

Key milestones

Hong Kong takes emergency measures as mystery 'pneumonia' infects dozens in China's Wuhan city

Dec 12th - 29th

First cases reported

Coronavirus: Northern Italy quarantines 16 million people

WHO Calls Coronavirus a Pandemic as Nations Brace for Pain

By Nagmi Kresge and Corinne Gretter

March 8- 11th

Italy locks down and Pandemic declared by WHO. U.S. Coronavirus Cases Passes 1 Million -- A Third Of All Cases Globally

April 28th

lockdown

The US passes 1 million confirmed cases as Europe considers easing

Coronavirus: World reaches dangerous new phase

June 28th

Global cases reach 10mllion

Russia's fast-track coronavirus vaccine draws outrage over safety

August 11th

Russia approves a coronavirus vaccine for public use

Trump's Covid-19 diagnosis raised a storm of misinformation chaos

October 3rd

Pres. Trump tests positive Coronavirus vaccine 'possible' before Christmas - but 2021 more likely, expert says

Europe Imposes New Covid-19 Covid: Wales to go into 'firebreak' lockdown from Restrictions as Second Wave Accelerates

Live | Latest coronavirus news: Vaccine is 'likely to be imperfect' and 'might not prevent infection', warns head of UK task force

October 18-28th

Further European Lockdowns as a vaccine in the UK becomes more likely.

DEC 2019

NOV 2020

WE ARE

HERE

Jan

Virus named COVID-19

A Virus With a Deadly Boring Name 2019-nCoV isn't going to cut it long tern

Coronavirus

Is Not The 'Corona Beer Virus,' What People Are Googling

February 2020

First death reported outside of China, and isolations begin.

Coronavirus: First death outside China reported in Philippines

Coronavirus: Diamond Princess passengers bored and isolated in quarantine, but many still love cruises

March 27th

President Trump signs a new stimulus package and EU locks down.

EU marks 25th anniversary of Schengen with closed borders

Trump signs \$2 trillion coronavirus relief bill as the US tries to prevent economic devastation

May 12th

UK extends its furlough scheme

Furlough extension 'huge relief' for workers and firms UK News | Published: May 12, 2020

July 1st

The EU opens its borders

EU external borders now open to some countries, but not US

September 20th -29th

Many European countries are reintroducing restrictions in the run up to winter. Global cases soar.

Europe lockdown fears trigger worst stocks sell-off in three months

The global coronavirus death toll has officially reached 1 million — although experts believe the actual death toll is much higher

November 1-6th

Vaccine pressure increases as new concerns, and lockdowns, rise,

Denmark announces cull of 15 million mink over Covid mutation fears

AstraZeneca expects Covid vaccine trial results this year

UK coronavirus live: Liverpool begins city-wide Operation Moonshot Covid testing trial



UNWAVERING MEDIA ATTENTION

Perceived normality decreasing

COVID-19 dominated global media headlines

PRE	-COVID NOR	MAL	RAPID REAPPRAISAL	HOLDING	PATTERN	TEMPORAF	RY RESPITE	CONTINU	CONTINUOUS (RE)ADJUSTMENT AUG SEP OCT		
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV















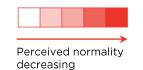






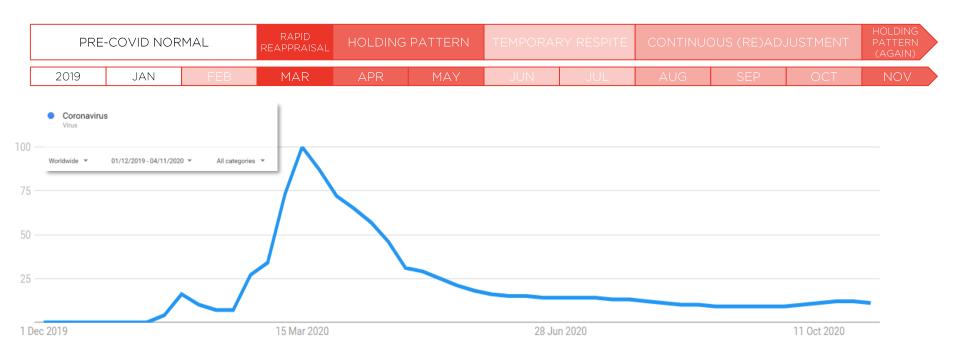






BBDOKNOWS DECLINING INTEREST

The interest dropped just as fast as it grew initially

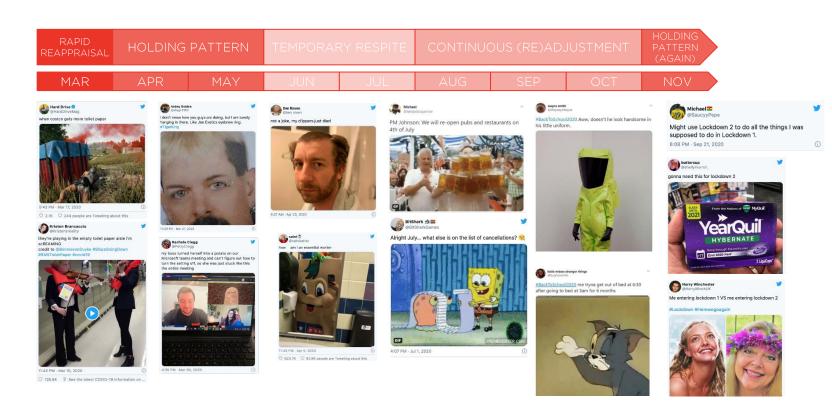




MAINTAINED SENSE OF HUMOUR

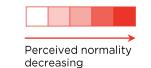
Perceived normality decreasing

To help carry us through the challenging times





BBDOKNOWS SUMMARY - THE PANDEMIC



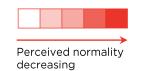
Charting our new reality

PRE-	PRE-COVID NORMAL REAR			L HOLDING PATTERN		TEMPORAF	RY RESPITE	CONTINUC	DUS (RE)AD.	JUSTMENT	HOLDING PATTERN (AGAIN)
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV
COVID DEATHS Source	1				•		•				
NEW COVID CASES Source			1			1			1	1	
GOVERNMENT RESPONSE STRINGENCY Source		1	1		Please note	government re	esponse stringe	ency differs dr	rastically betw	een countries	
PUBLIC INTEREST IN THE PANDEMIC Source		•		•	•						
			mains equal to onth/quarter	• •		e has increase o the previou ter			alue has dec ed to the pre quarter		

CHARTING THE ECONOMY

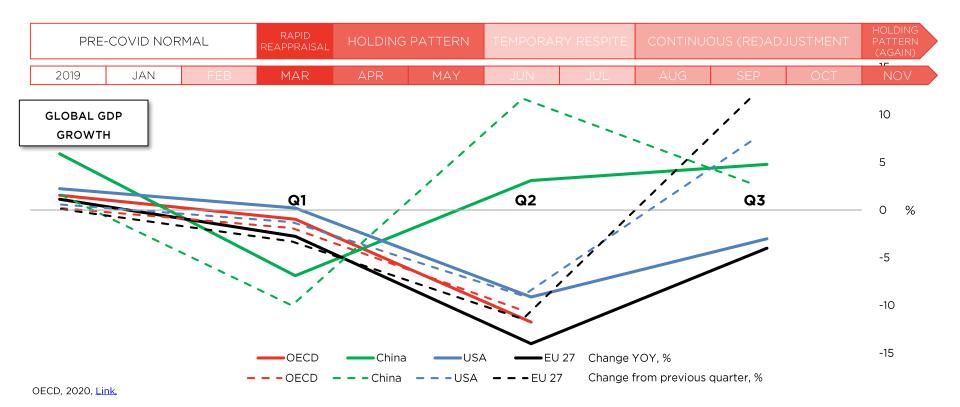
.. and business performance

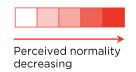




GLOBAL GDP IMPACT: NEGATIVE GROWTH

Year-on-year growth remains negative for most, but quarterly growth returned in Q3

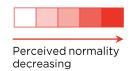




BBDOKNOWS WORLD TRADE IMPACT: NEGATIVE GROWTH

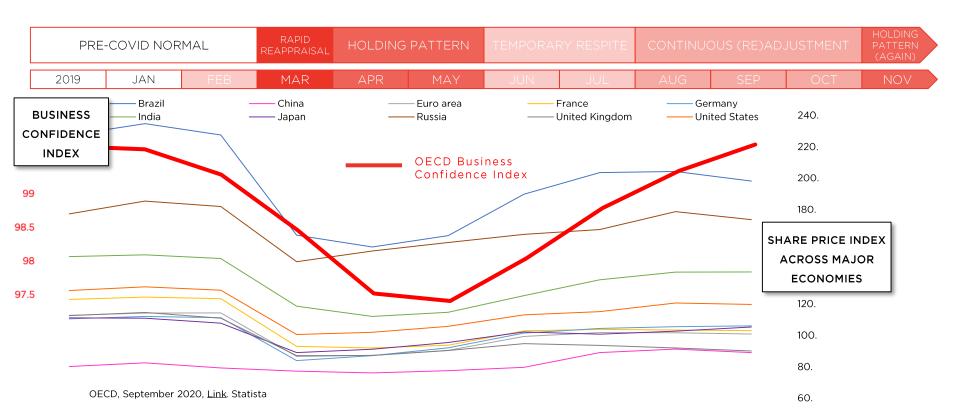
Contracted, then stabilised, still with a minor negative growth expected in Q3





BUSINESS IMPACT: CONFIDENCE AND PERFORMANCE

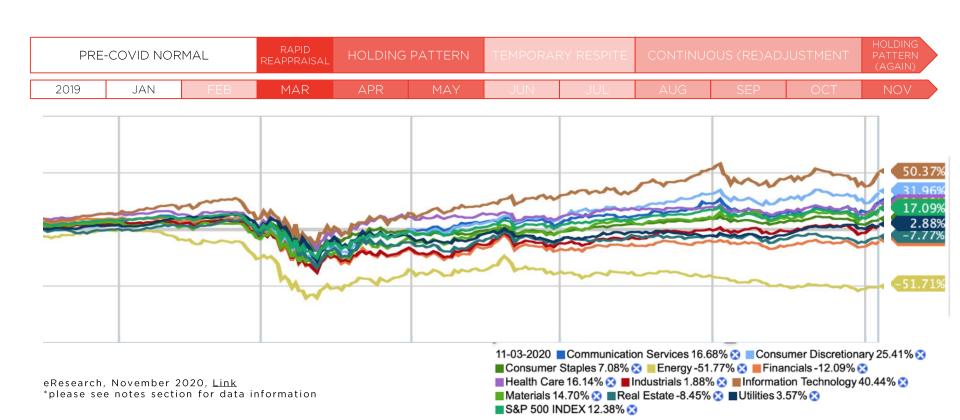
Business confidence and share price index follow a similar trajectory

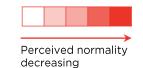




MARKET CAPITALISATION: CHANGE IN THE US

Varied impact on individual categories





BBDOKNOWS SUMMARY - KEY ECONOMIC MEASURES

Mapped to the phases of the pandemic

PRE-	COVID NOF	RMAL	RAPID HOLDING PATTERN			TEMPORAI	RY RESPITE	CONTINUOUS (RE)ADJUSTMENT			
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	N
GLOBAL TRADE Source	Q1	•		Q2	-		Q3				
GLOBAL GDP Source	Q1	-		Q2	-		Q3				
BUSINESS CONFIDENCE Source		•	•	•	•			•			
SHARE PRICE INDEX Statista		•	•	1				1			
			mains equal to onth/quarter			has increase the previou			alue has decr ed to the prev Juarter		

CONSUMER

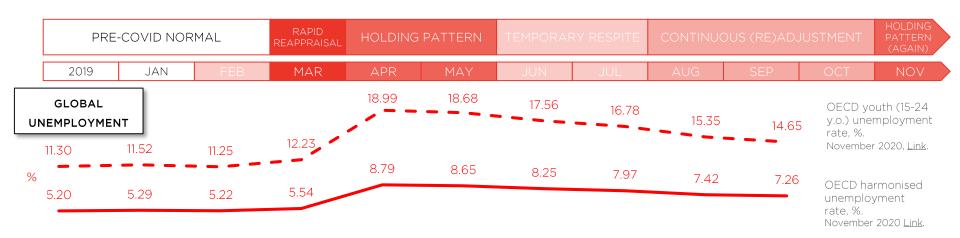
Charting sentiment and behaviour





BBDOKNOWS FINANCIAL IMPACT: RISE IN UNEMPLOYMENT

Youth disproportionately impacted, governments quick to react and support



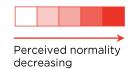


BBDOKNOWS FINANCIAL IMPACT*: DECREASE IN INCOME

* EU 27 data

As a result consumption decreased, but savings rate reached an all-time high





EMOTIONAL IMPACT: FLUCTUATING OPTIMISM

National pictures differ, but individual ones will vary endlessly

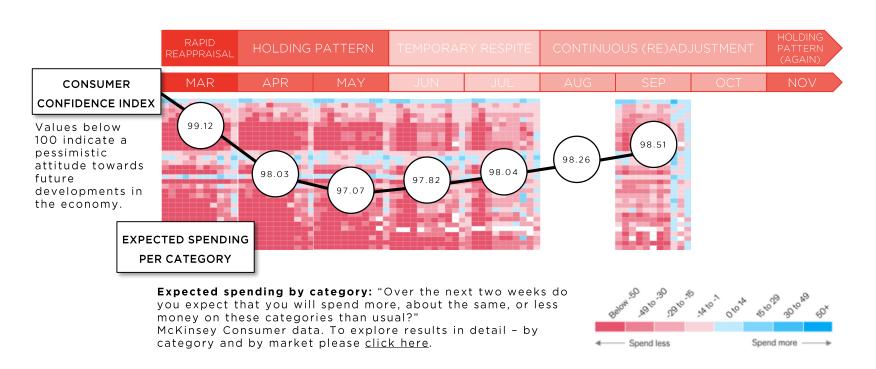


McKinsey, October 2020, Link; Twitter, Link.



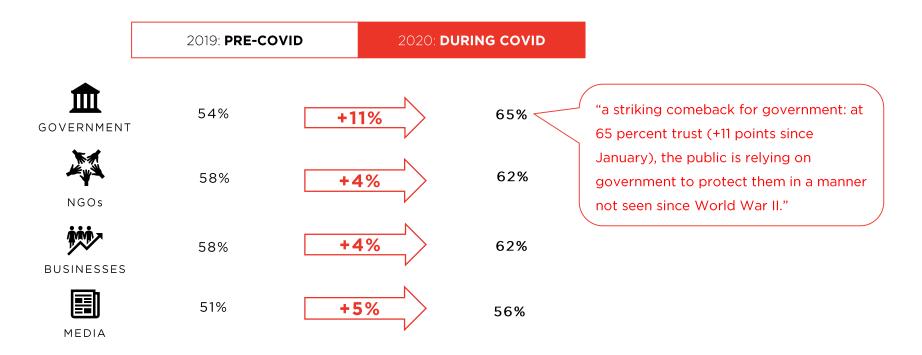
EMOTIONAL IMPACT: FLUCTUATING CONFIDENCE

Purchase intent directly reflected confidence



SENTIMENT IMPACT: RISE IN TRUST ACROSS ALL INSTITUTIONS

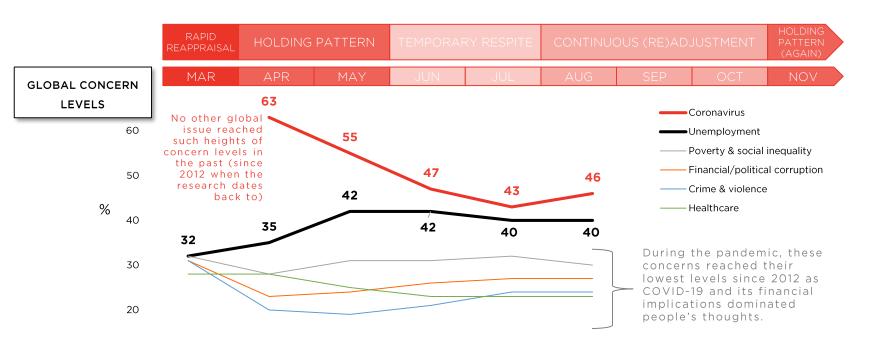
Government sees the highest increase





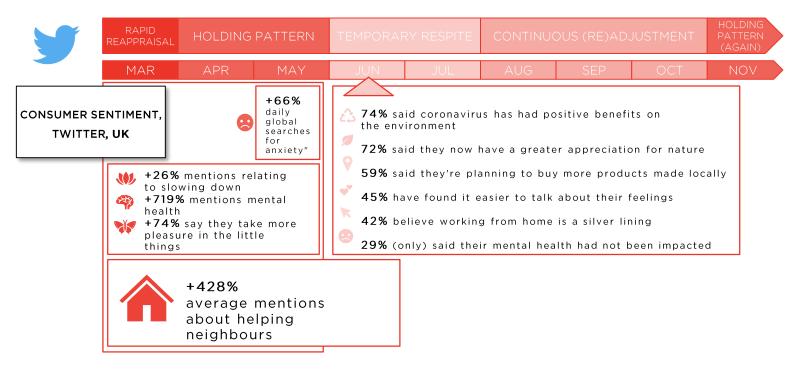
SENTIMENT IMPACT: TWO CONCERNS DOMINATE

Health and employment by and large overshadowed all other concerns



SENTIMENT IMPACT: REFLECTED IN SOCIAL MEDIA*

Twitter analysis reveals a complex picture



Twitter data, UK 2020, Link

* UK only data

BBDOKNOWS NEEDS IMPACT: REFLECTED IN OUR SEARCHES

Google searches - rising - worldwide

Google

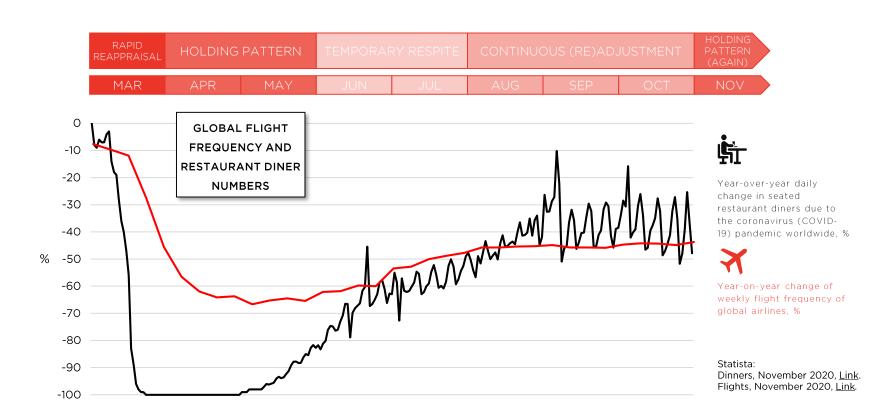
PRE-	-COVID NOR	MAL	RAPID REAPPRAISAL	HOLDING	PATTERN	TEMPORAI	RY RESPITE	CONTINU	OUS (RE)AD	JUSTMENT	HOLDING PATTERN (AGAIN)
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	ОСТ	NOV
+850% New Year	Coronavirus	+450% Valentine's Day	+1,200 Zoom Video Comms	+700% Ramadan	+300% Mother's Day	+300% Father's Day	+250% July	+950% FC Bayern Munich	+1,900% Indian Premier League	+350% Halloween	
+800% West Indies cricket team	Kobe Bryant	+190% Coronavirus	+850% Quarantine	+350% Internal Revenue Service	+250% May	+250% June	+120% Premier League	+700% UEFA Champions League	+450% NFL	+250% October	
+160% December	+450% Virus	+150% February	+800% Hand sanitizer	+250% April	+80% Swimming Pool	+110% Father	+60% Sports league	+300% NBA	+180% September	+180% Indian Premier League	

Google Trends, Accessed Nov 2020. Global data



BEHAVIOUR IMPACT: WE STAYED IN

Sharp decrease in travel and eating out, still not recovered



BEHAVIOUR IMPACT: WE PLAYED IN

How we adapted in the early days of the pandemic























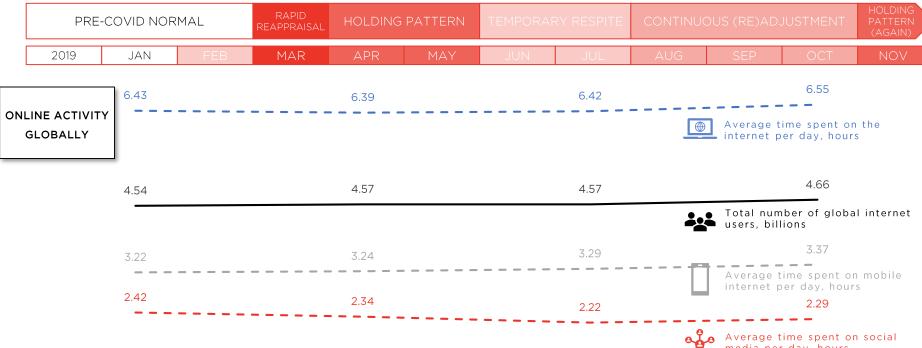


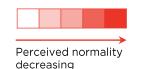


BEHAVIOUR IMPACT: WE STAYED ONLINE



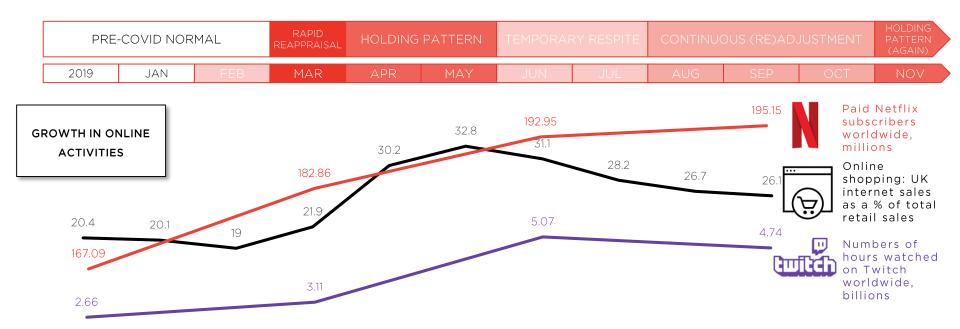
We stayed online for connection & distraction





BEHAVIOUR IMPACT: WE PLAYED ONLINE

People flocked online to shop and escape





Perceived normality

decreasing

BBDO KNOWS

SUMMARY - THE HUMAN PHASES OF THE PANDEMIC

Charting consumer behaviour and sentiment

PRE-COVID NORMAL 2019 JAN **GLOBAL** UNEMPLOYMENT REAL GROWTH Preliminary estimates DISPOSABLE Q1 Q2 Q3 suggest a continued INCOME PER CAPITA decline in Q3 CONCERN ABOUT COVID-19 CONSUMER CONFIDENCE OUT OF HOME **ACTIVITIES** ONLINE **ACTIVITIES**

MEDIA AND BRANDS

Charting brand spend & responses

The World News

WEDNESDAY, APRIL 15, 2020

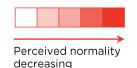


AD SPEND IMPACT: COVID WINNERS

E-commerce and social media

	2019: PRE-CO	VID	2020: 🖸	OURING COVID
拼多多 PINDUODUO	\$ 121.80	+34	1%	\$ 162.94
amazon	\$ 446.68	+16	%	\$ 516.83
Tencent 腾讯	\$242.48	+11	%	\$268.07
阿里巴巴 《 Alibaba .com"	\$762.77	+4	%	\$816.61
You Tube	\$480.37	+4	%	\$499.21
f	\$2,208.75	+3	%	\$2.274.18

Amazon, the 4th largest ad seller now makes \$516.83 from ads per second – this means a rise of \$70.16 since the pandemic began. This is the highest rise amongst the 36 companies WARC monitors.



CAMPAIGN IMPACT: PLANS PIVOTED

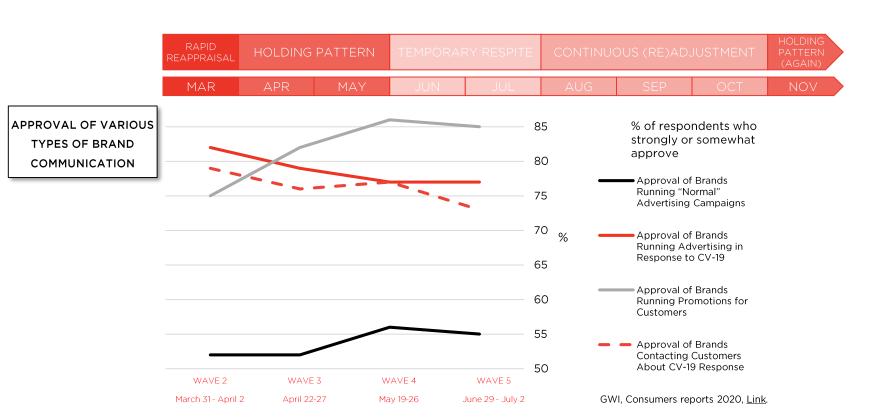
But more than half of advertisers are no longer deferring campaigns

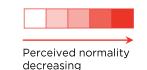




BRAND IMPACT: EXPECTATIONS SHIFTED

As the circumstances evolved





COMMS IMPACT: RESPONSES ADAPTED

Evolved to reflect people's needs of the moment

				HOLDING
RAPID REAPPRAISAL	HOLDING PATTERN	TEMPORARY RESPITE	CONTINUOUS (RE)ADJUSTM	ENT HOLDING PATTERN (AGAIN)
MAR	APR MAY	JUN JUL	AUG SEP OC	CT NOV
	•		>> I	8
ACTS NOT ADS	COMMUNICATING COMPASSION	COMMUNICATING CONTEXT	COMMUNICATING NEW	A HOLIDAY SEASON LIKE NO OTHER
Throughout all phases of COVID- 19 so far, we have expected	During lockdown we expected brands to communicate and illustrate their compassion by reflecting our new	As we emerged from lockdown, tentatively, we expected brands to continue to reflect the changing reality. To continue to support and	And as some of us grow increasingly fatigued at the challenges we face we expect brands to continue to help us navigate the new ones.	We expect a more "human" holiday season with high levels of empathy to reflect the

acts of good from brands. But this was never truer than in the first phase.

reality by giving back, and by supporting those most in need.

empower us.

Creative will continue to play an important role in our recovery.

uncertainties surrounding this

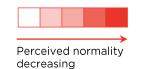
year's holidays.



Perceived normality decreasing

The work

RAPID REAPPRAISAL	HOLDING PATTERN	TEMPORARY RESPITE	CONTINUOUS (RE)ADJUSTMENT	HOLDING PATTERN (AGAIN)
MAR	APR MAY	JUN JUL	AUG SEP OCT	NOV
	•			
ACTS NOT ADS	COMMUNICATING COMPASSION	COMMUNICATING CONTEXT	COMMUNICATING NEW	A HOLIDAY SEASON LIKE NO OTHER
POSTPONE YOUR BIRTHDAY Juplier - BBDO Belgium	Service Now - BBDO San Francisco	P&G-BBDO Indonesia	Google – Redwood UK AT&T MOT COMPLICATE AT&T – Hearts & Science, BBDO	SHOP AND SHIP EARLY. FedEx - BBDO NY
Visa - BBDO NY	Uncle <u>Ben's</u> - Energy BBDO	Uncle <u>Ben's</u> - Energy BBDO	Snickers - BBDO NY Snickers - BBDO NY Snickers - BBDO NY	ASDA - AMV BBDO
Jack Daniels – Energy BBDO	Maltesers- AMV BBDO	Post-it - BBDO Minneapolis	Unilever - BBDO Pakistan Unilever - BBDO Pakistan	MYER - Clemenger BBDO



BBDOKNOWS SUMMARY - MEDIA AND BRANDS

Charting brand responses

	RAPID REAPPRAISAL	HOLDING	PATTERN	TEMPORAF	RY RESPITE	CONTINU	OUS (RE)AD	JUSTMENT	HOLDING PATTERN (AGAIN)
	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV
CAMPAIGNS DEFERRED Source	1			1		•	•		
APROVAL OF NORMAL ADVERTISING Source		•	1			Γ			
APPROVAL OF ADS IN RESPONSE TO C19 Source		•	•	•			the p	a value remai revious mont a value has ir	h/quarter ncreased
APPROVAL OF CONTACTING CONSUMER ABOUT C19 Source		•	1	•			montl	ared to the p n/quarter a value has d	
APPROVAL OF RUNNING PROMOTIONS				•			comp	ared to the p	



When the pandemic is documented in history, data will dictate its narrative.



Data in context, data recorded over time, data compared and charted, affords us critical insight...

And will continue to provide a compass on our path to recovery.

BBDOKNOWS BBDO KNOWS IN THE TIME OF COVID

Our COVID-19 coverage, papers per month



BBDO KNOWS COVID-19 - OCCASIONS PART 2

BBDO KNOWS COVID-19 - THE B2B OPPORTUNITY

BBDO KNOWS COVID-19 - CREATIVE IN THE TIME OF COVID

BBDO KNOWS COVID-19 - HEALTH & CARE, NOW & NEXT

BBDO KNOWS COVID-19 - CHARTING THE PANDEMIC

	PRE-C	OVID NOR	MAL	RAPID REAPPRAISAL			TEMPORA	TEMPORARY RESPITE CON		CONTINUOUS (RE)ADJUSTMENT		
20)19	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	ОСТ	NOV
		**		· ·				7	-7			
				en en			en en					
							* PLEASE	REQUEST	ANY OF	THE PAPERS	YOU MISSED	:
								CORONAVIRUS			COVID-19 - 5 EMOTIONA	
							BBDO KNOWS	COVID-19 - TELCO COVID-19 - RETAIL		BBDO KNOWS	COVID-19 - THE CATEGO COVID-19 - THE FUTURE	OF WORK
							BBDO KNOWS	COVID-19 - TRAVEL COVID-19 - BRAND RES COVID-19 - BANKING	SPONSES	BBDO KNOWS	GCOVID-19 - A GENERATIONS GCOVID-19 - VACATIONS GCOVID-19 - OCCASIONS	

BBDO KNOWS COVID-19 - LIFEAT HOME

BBDO KNOWS COVID-19 - WHAT'S NEXT

BBDO KNOWS COVID-19 - SCENARIO PLANNING

BBDO KNOWS COVID-19 - BRAND NOW & NEXT

BBDO KNOWS COVID-19 - AN ARGUMENT IN FAVOUR OF ...

^{*} Please request via the BBDO Knows team, bbdo@bbdoknows.com