

**BBDO** KNOWS

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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.

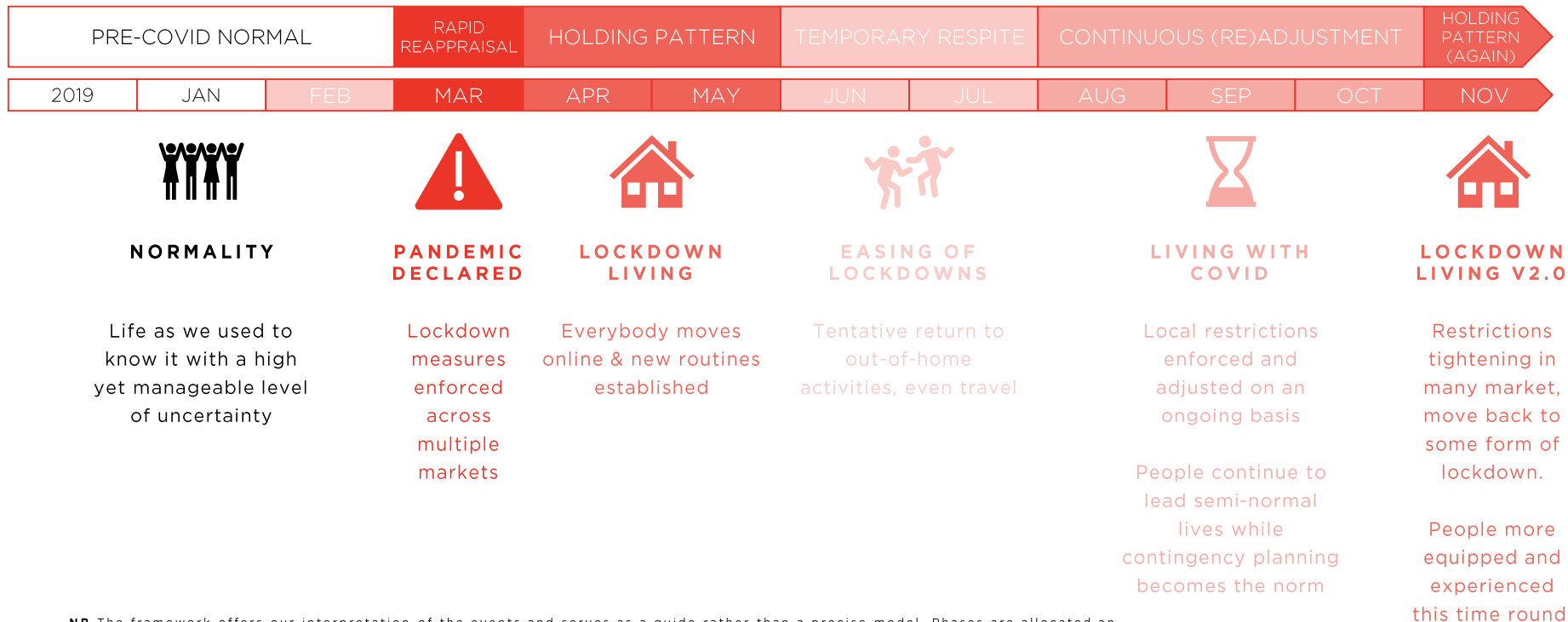
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We have also used data to map the key phases of the pandemic, and where possible we will use these phases throughout this presentation in order to provide a consistent reference and anchor point for the charts.

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

# BBDO KNOWS BBDO KNOWS FRAMEWORK

*The human phases of the pandemic*

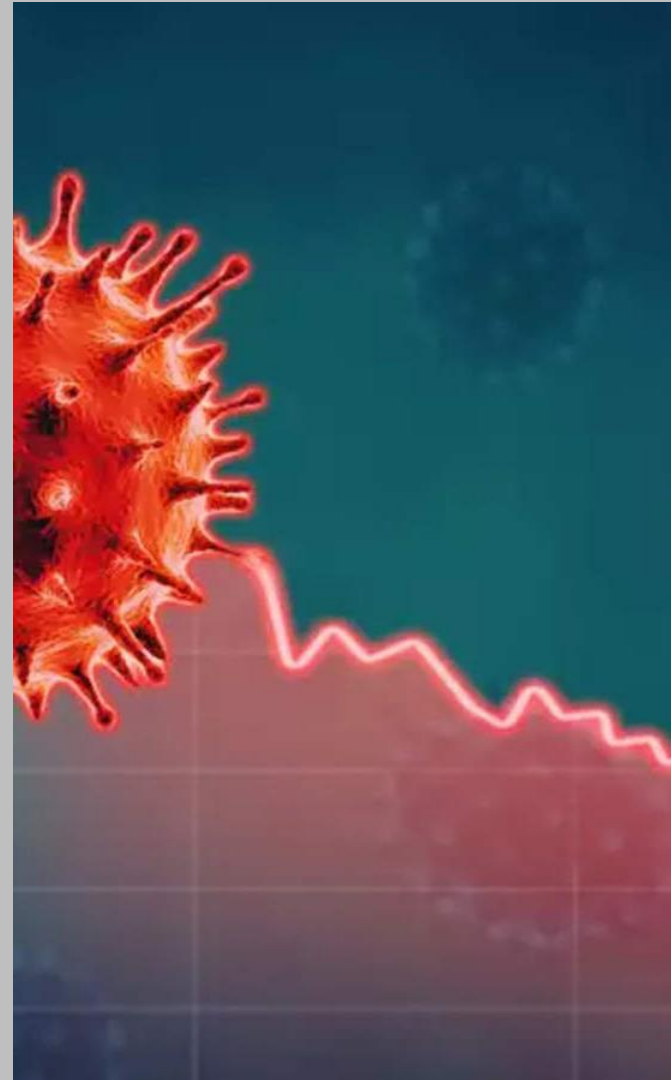


**NB** The framework offers our interpretation of the events and serves as a guide rather than a precise model. Phases are allocated an "average" time frame in the 2020 calendar following global events rather than focusing on individual markets.

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## CHARTING THE PANDEMIC

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

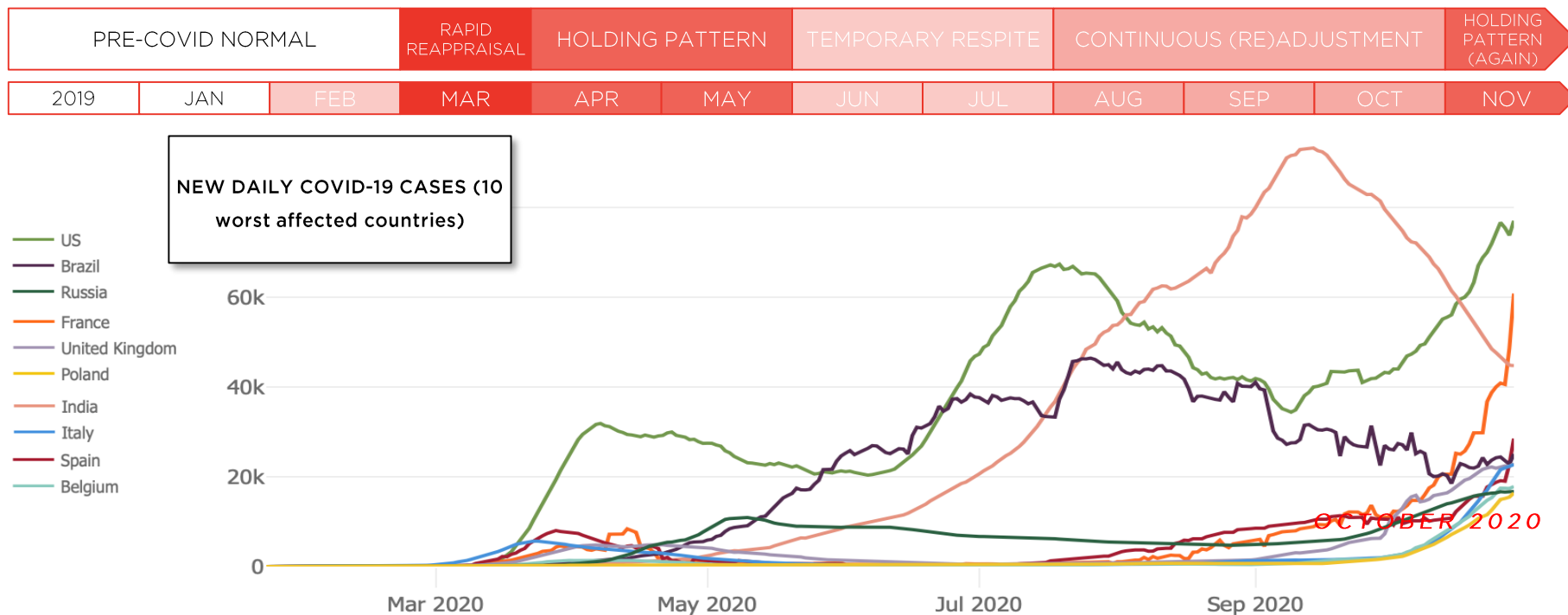


The scale of the virus was so far reaching that its impact could be seen and charted across multiple measures.

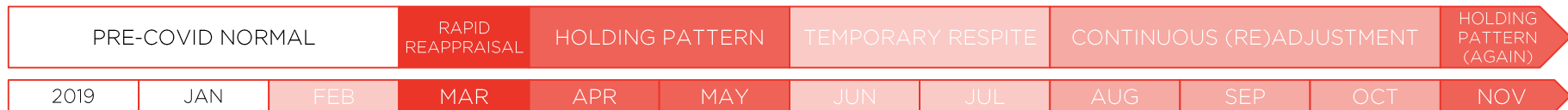
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With unparalleled results:

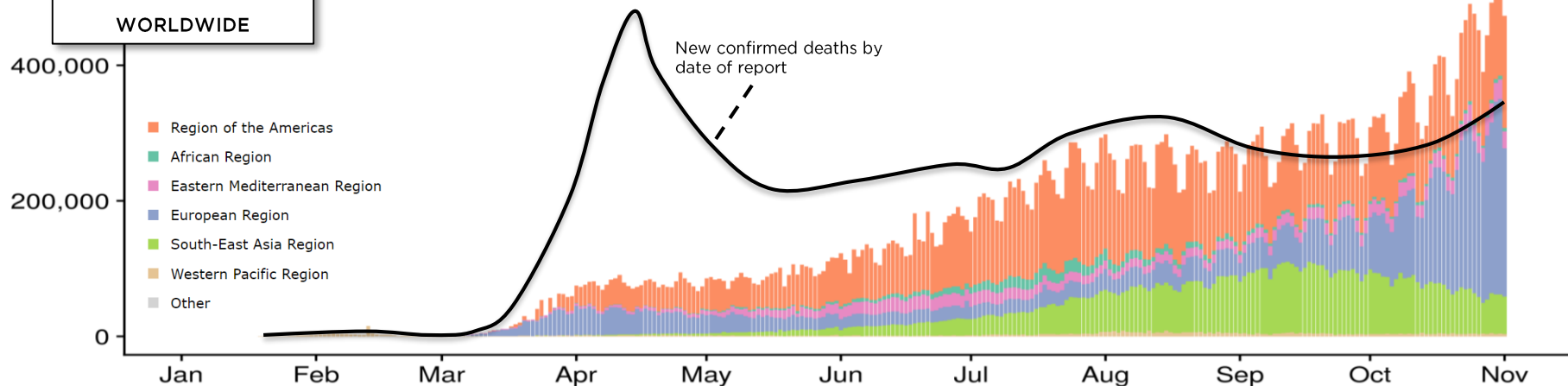
*Each market has its own COVID story*



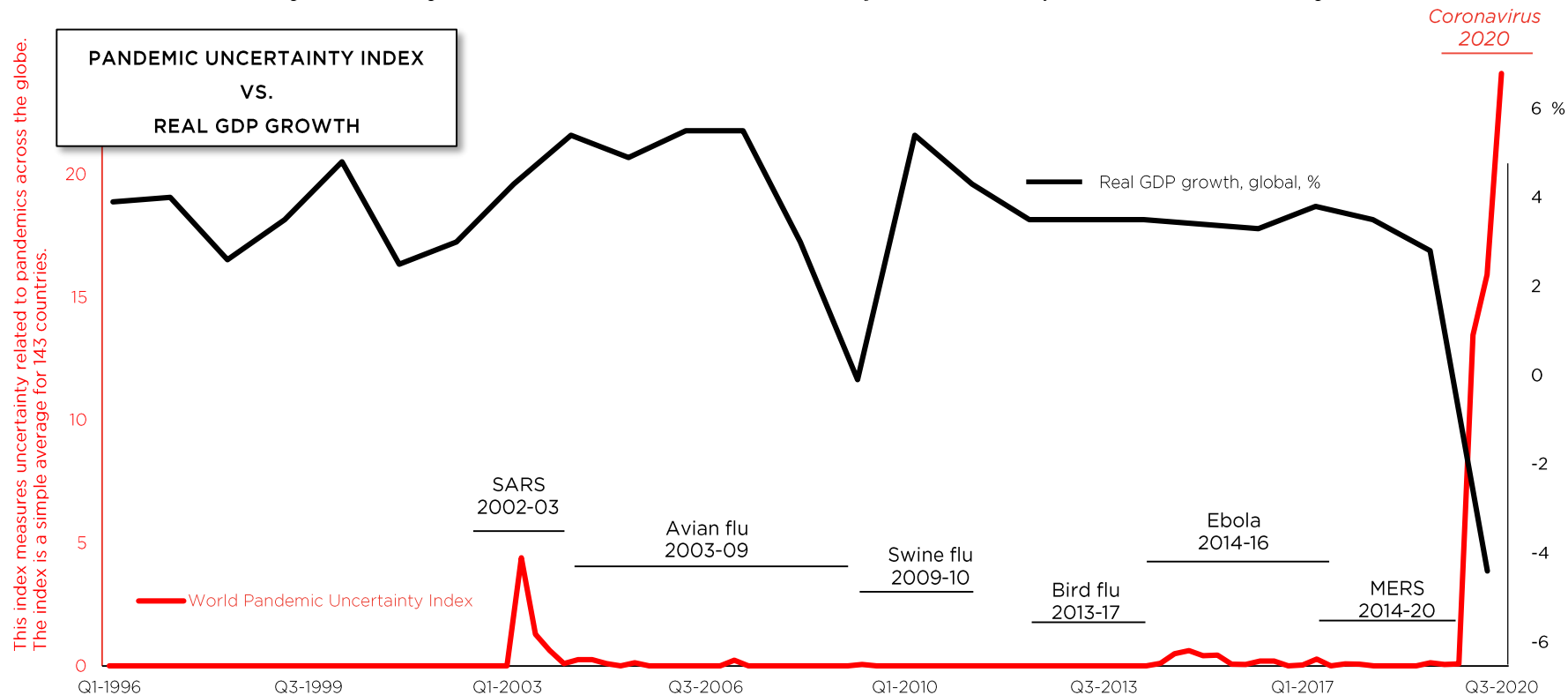
*Globally, growth in cases continues accelerating*



**NEW DAILY COVID-19  
CASES AND DEATHS  
WORLDWIDE**

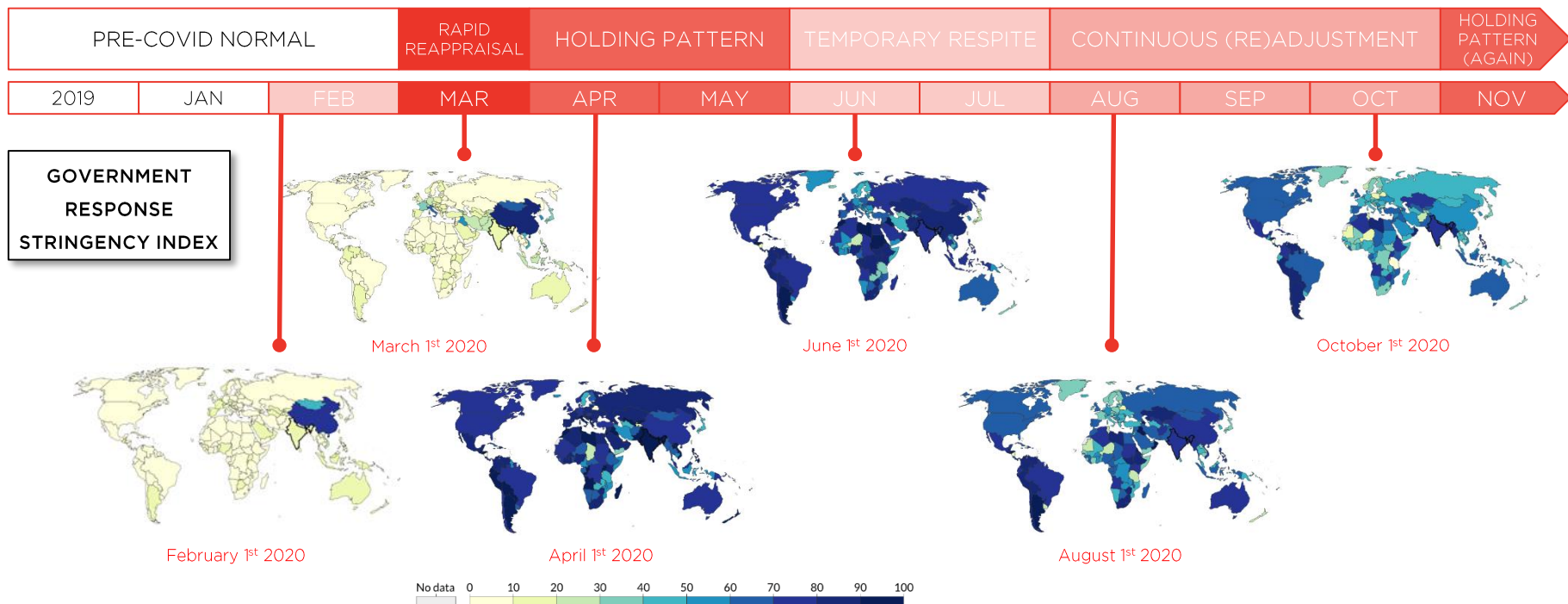


*No previous pandemic caused such level of uncertainty and economic impact*





*Strictness in curtailing measures fluctuated monthly*



# BBDO KNOWS A GLOBAL TIMELINE

## Key milestones

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

**Dec 12<sup>th</sup> - 29<sup>th</sup>**

First cases reported

Coronavirus: Northern Italy quarantines 16 million people

© B. March

**WHO Calls Coronavirus a Pandemic as Nations Brace for Pain**

By Naomi Kossie and Corinne Greider  
11 March 2020, 18:58 GMT

**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 28<sup>th</sup>**

The US passes 1 million confirmed cases as Europe considers easing lockdown

Coronavirus: World reaches dangerous new phase

**June 28th**

Global cases reach 10million

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 3<sup>rd</sup>**

Pres. Trump tests positive

Coronavirus vaccine 'possible' before Christmas - but 2021 more likely, expert says

Europe Imposes New Covid-19 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 18-28<sup>th</sup>**

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

WE ARE HERE

DEC 2019

NOV 2020

**Jan**

Virus named COVID-19

A Virus With a Deadly Boring Name

2019-nCoV isn't going to cut it long term.

**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

PHOTOGRAPH BY MICHAEL W. SUTHERLAND FOR THE NEW YORK TIMES

**May 12th**

UK extends its furlough scheme

Furlough extension 'huge relief' for workers and firms

UK: BBC | Published May 12, 2020

**July 1st**

The EU opens its borders

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

**September 20<sup>th</sup> -29th**

Many European countries are re-introducing 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 1–6<sup>th</sup>**

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

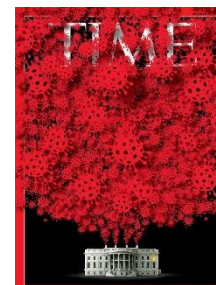
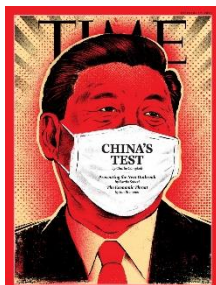
UK coronavirus live: Liverpool begins city-wide Operation Moonshot Covid testing trial

# BDO KNOWS UNWAVERING MEDIA ATTENTION

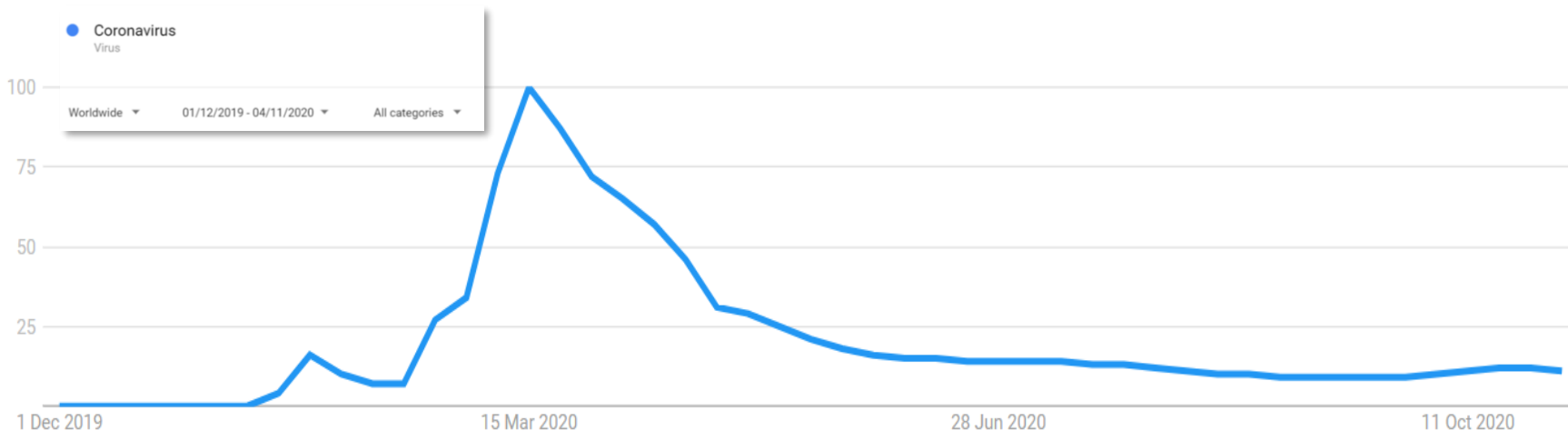
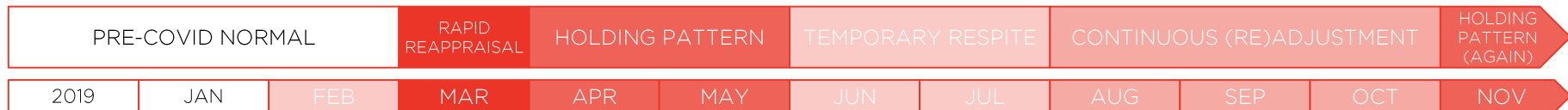
*COVID-19 dominated global media headlines*



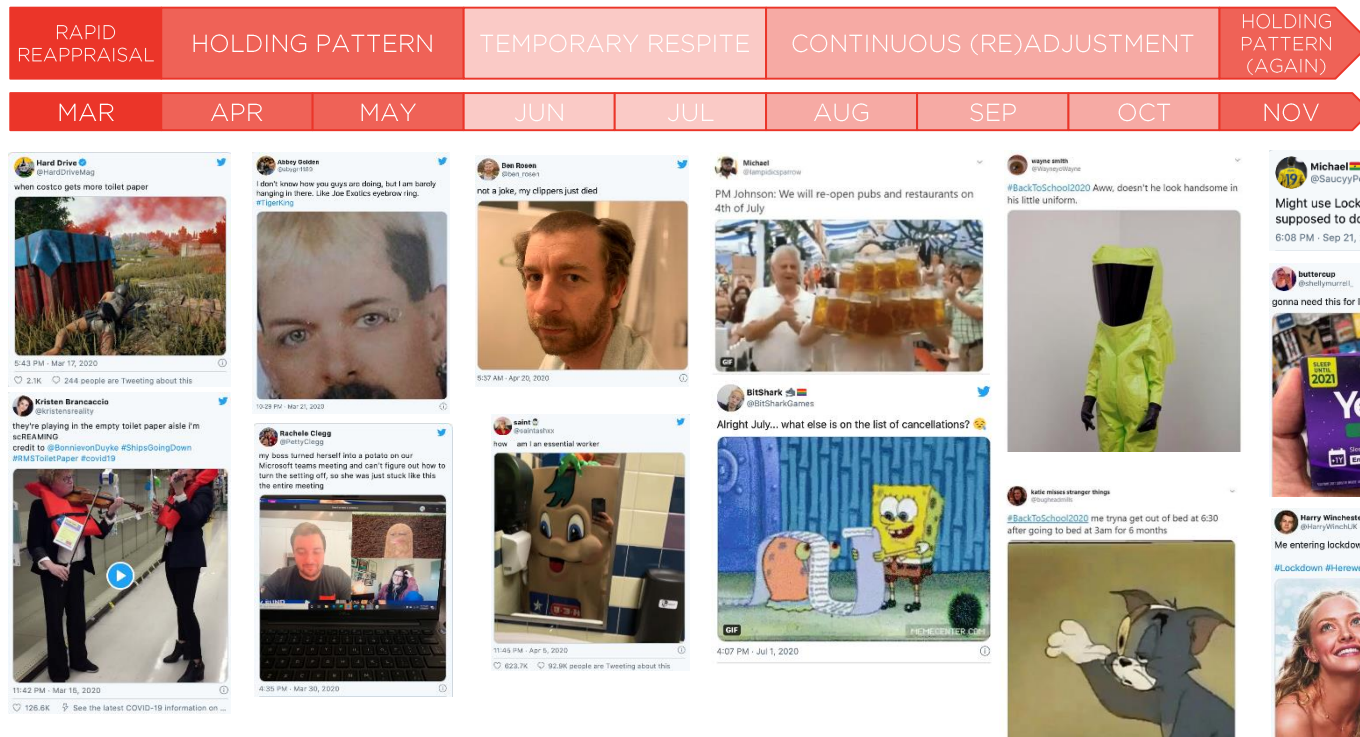
PRE-COVID NORMAL			RAPID REAPPRAISAL	HOLDING PATTERN		TEMPORARY RESPITE		CONTINUOUS (RE)ADJUSTMENT			HOLDING PATTERN (AGAIN)
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV

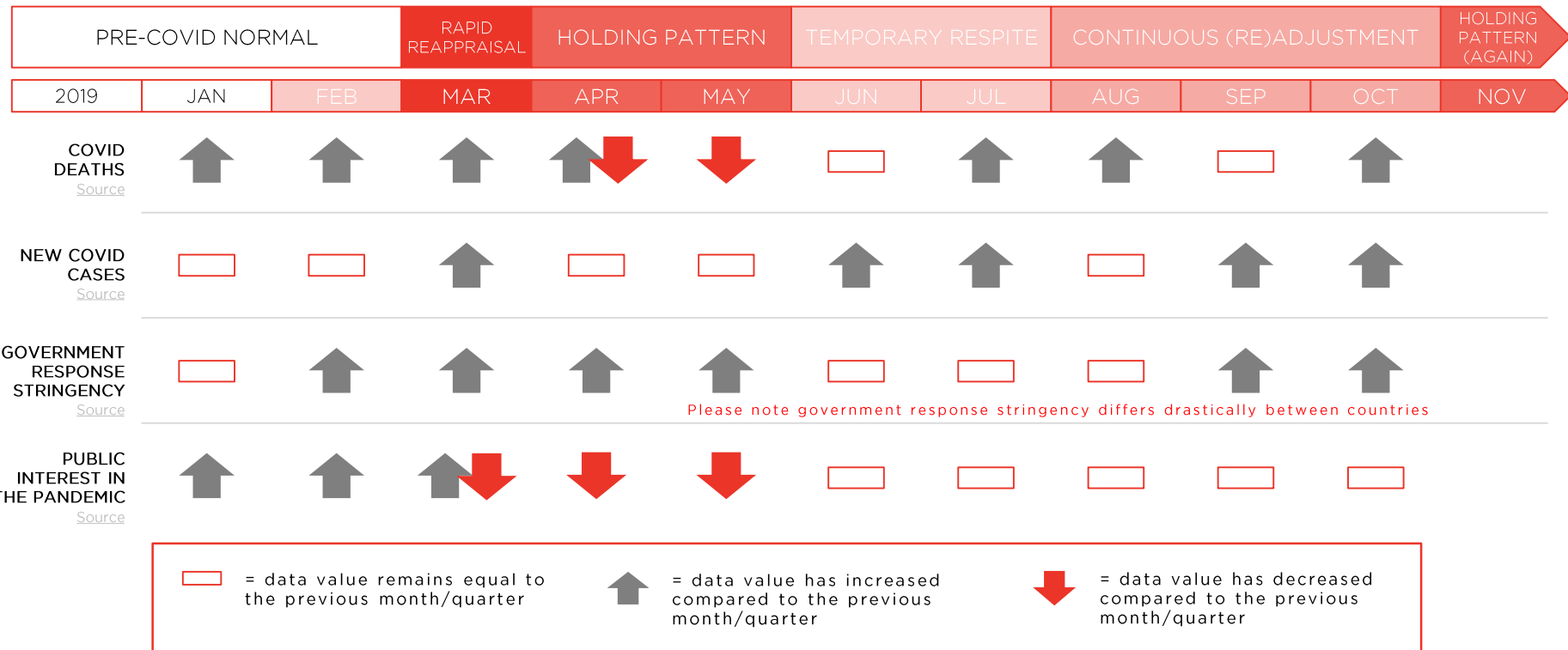


*The interest dropped just as fast as it grew initially*



*To help carry us through the challenging times*



*Charting our new reality*




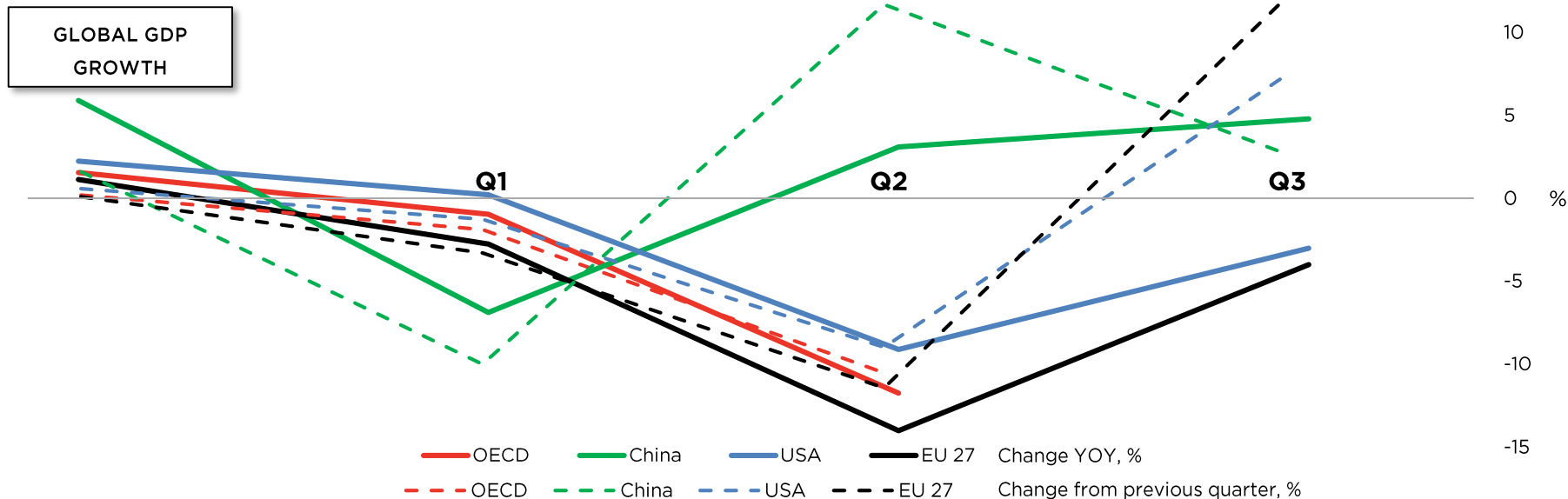
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# CHARTING THE ECONOMY

*... and business performance*

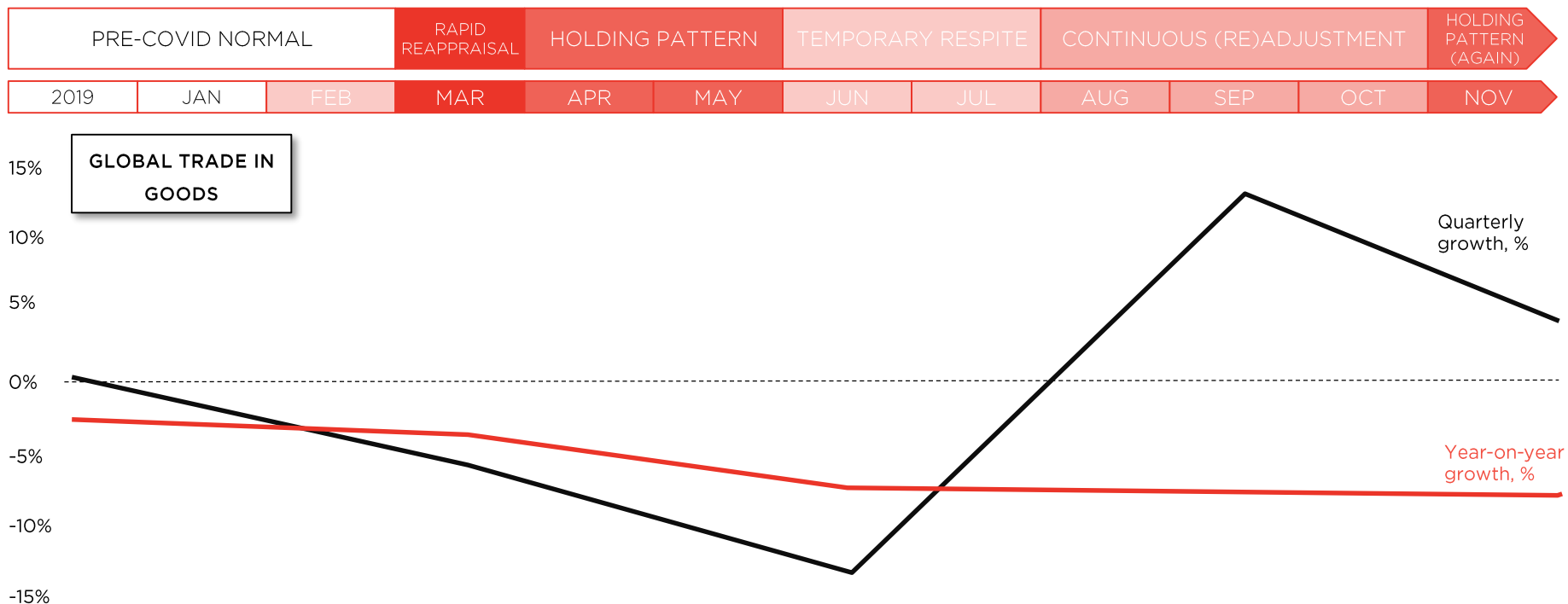


*Year-on-year growth remains negative for most, but quarterly growth returned in Q3*

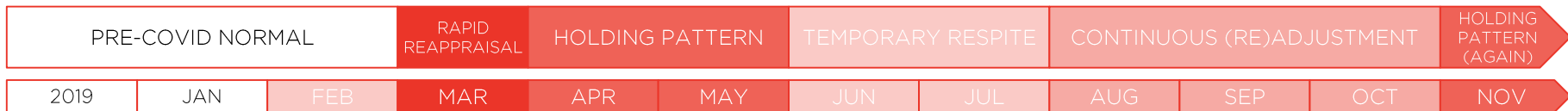
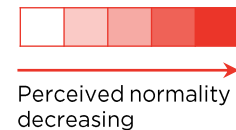




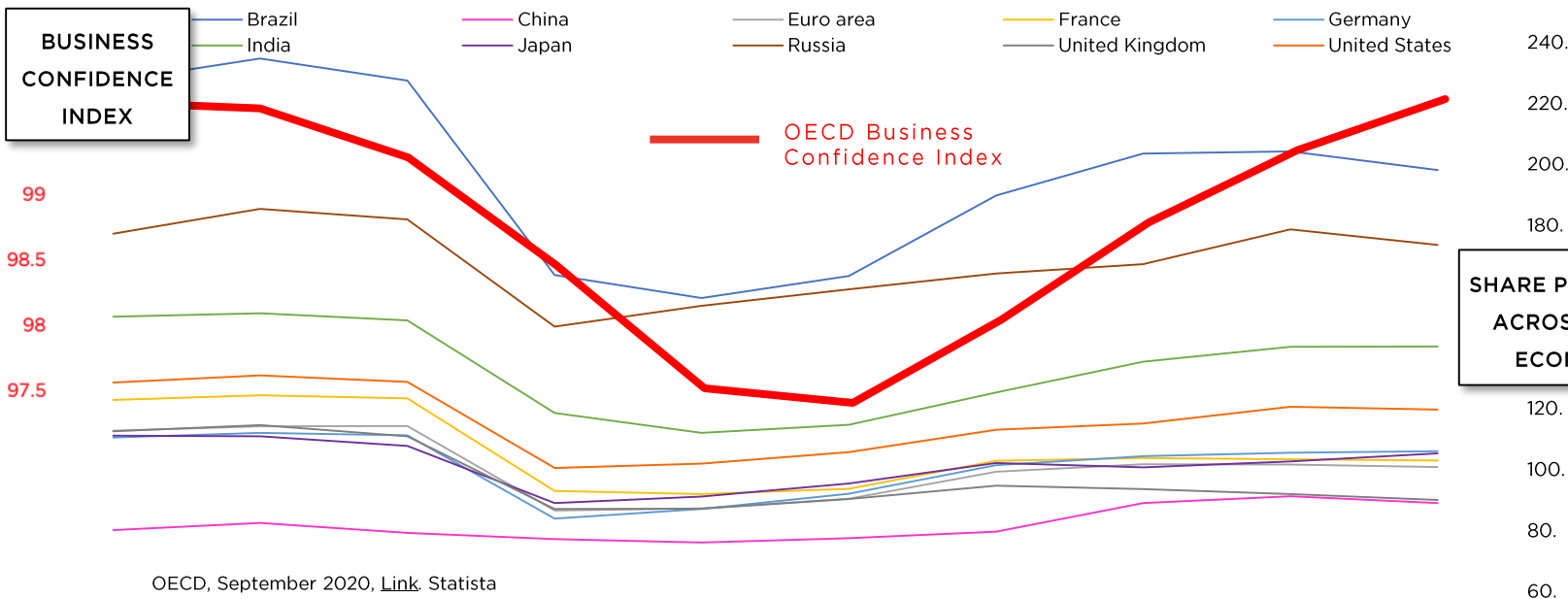
*Contracted, then stabilised, still with a minor negative growth expected in Q3*



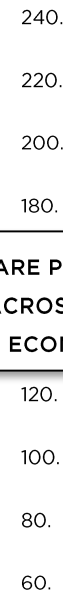
*Business confidence and share price index follow a similar trajectory*



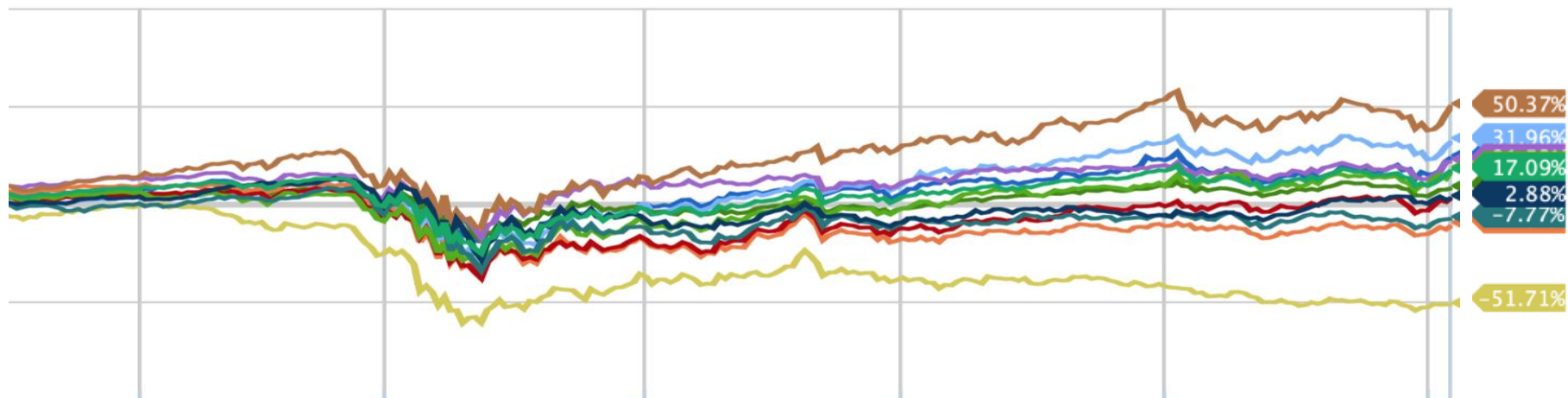
**BUSINESS  
CONFIDENCE  
INDEX**



**SHARE PRICE INDEX  
ACROSS MAJOR  
ECONOMIES**



## MARKET CAPITALISATION: CHANGE IN THE US

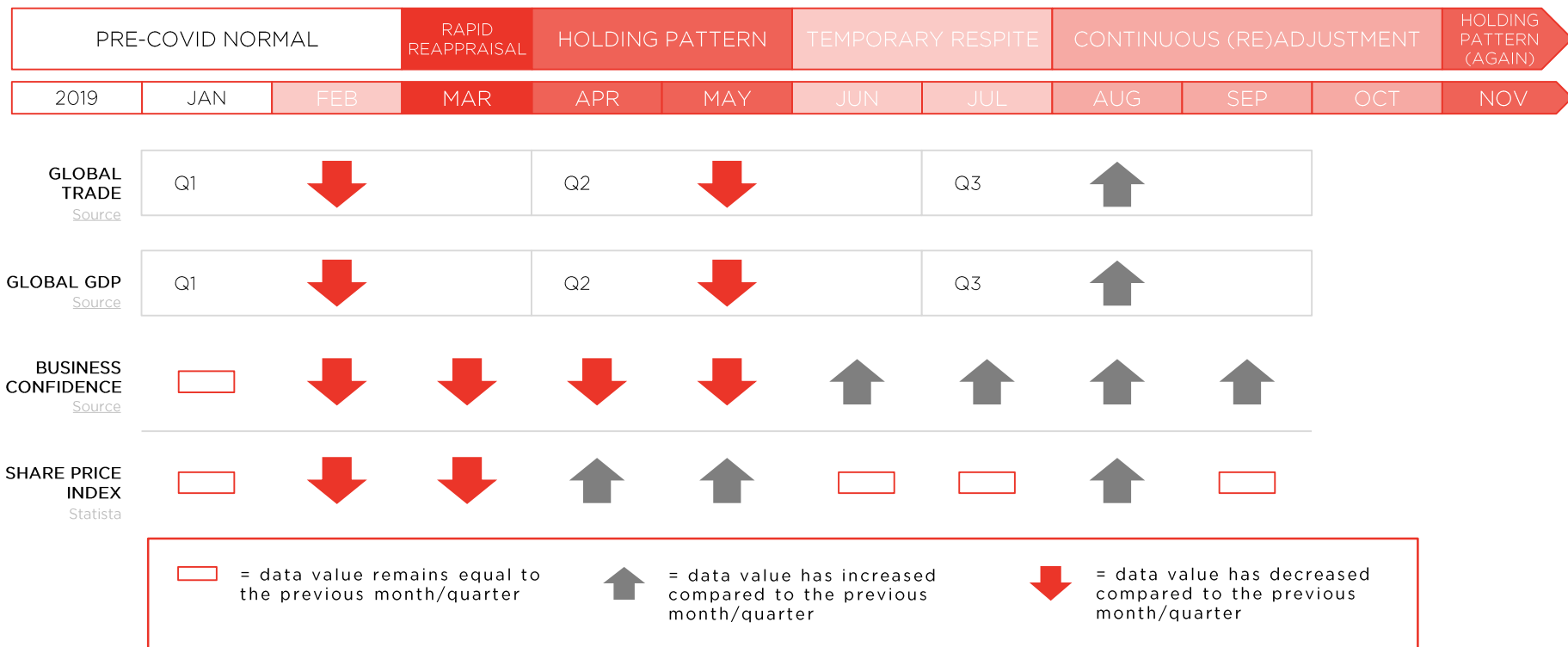
*Varied impact on individual categories*

eResearch, November 2020, [Link](#)  
 \*please see notes section for data information

11-03-2020

Communication Services 16.68%	Consumer Discretionary 25.41%
Consumer Staples 7.08%	Energy -51.77%
Health Care 16.14%	Financials -12.09%
Materials 14.70%	Industrials 1.88%
Real Estate -8.45%	Information Technology 40.44%
Utilities 3.57%	S&P 500 INDEX 12.38%

*Mapped to the phases of the pandemic*



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# CONSUMER

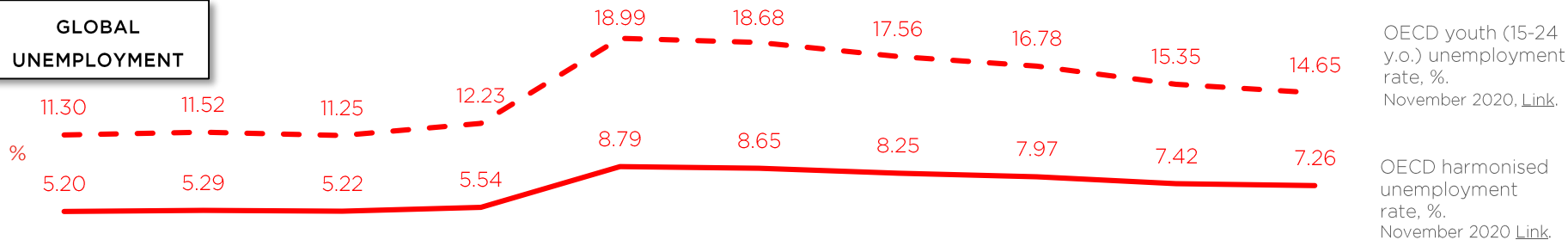
*Charting sentiment and behaviour*



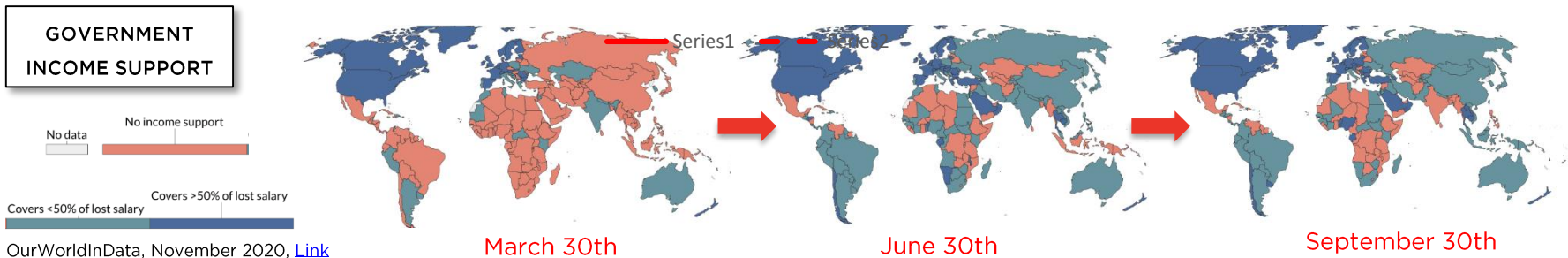
*Youth disproportionately impacted, governments quick to react and support*



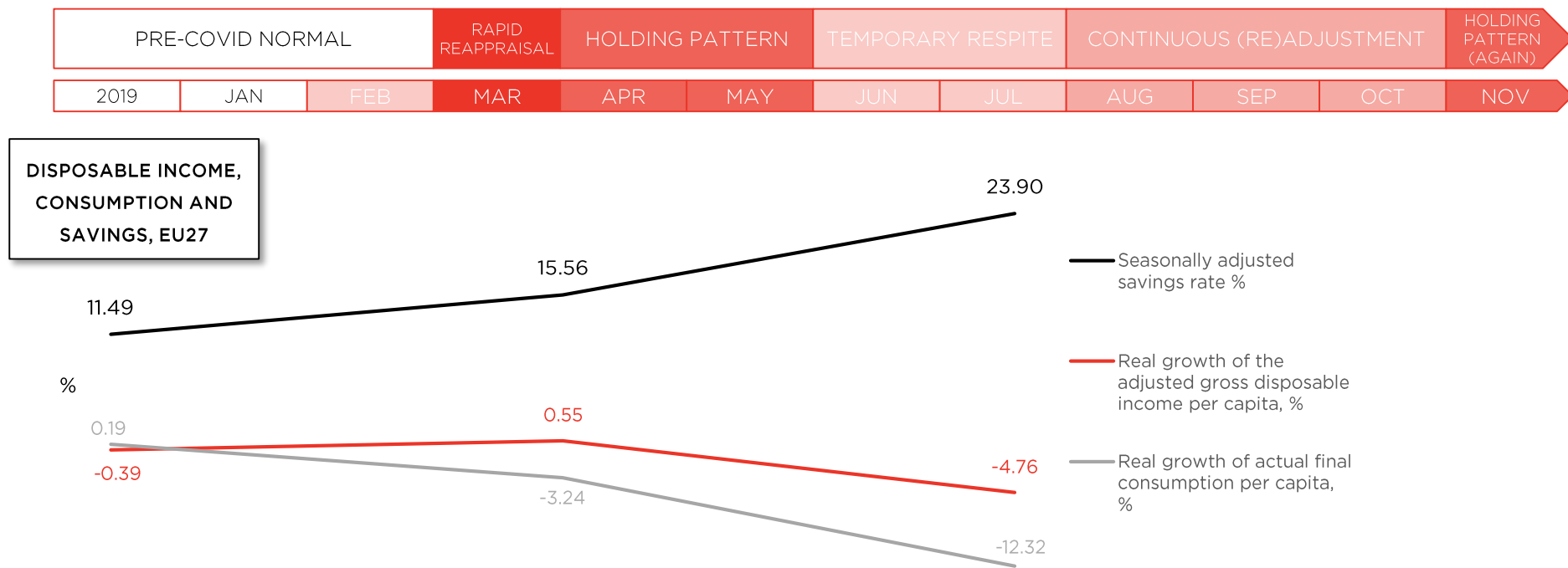
## GLOBAL UNEMPLOYMENT



## GOVERNMENT INCOME SUPPORT



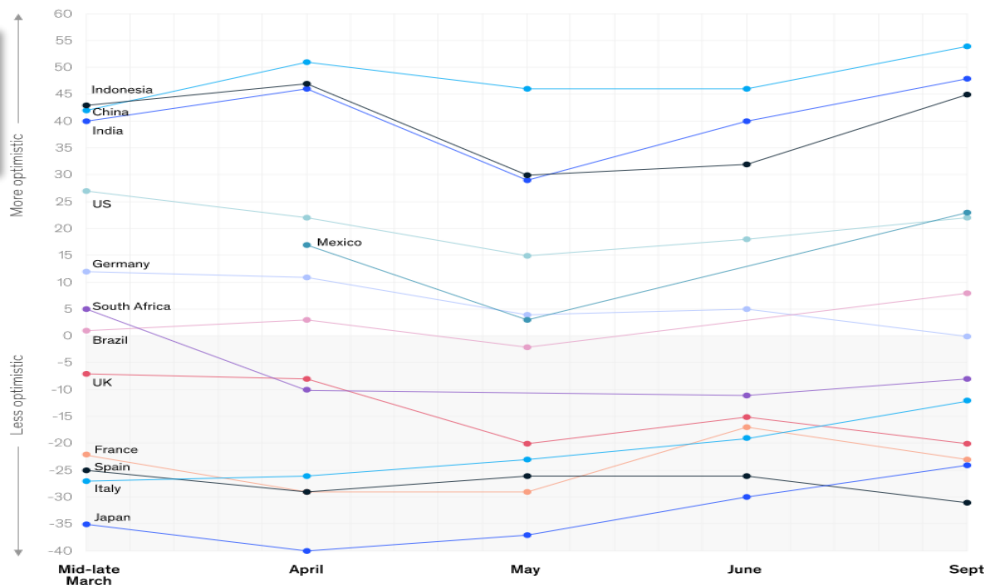
*As a result consumption decreased, but savings rate reached an all-time high*



*National pictures differ, but individual ones will vary endlessly*



### OPTIMISM LEVELS BY COUNTRY



### #HomeTruth 4

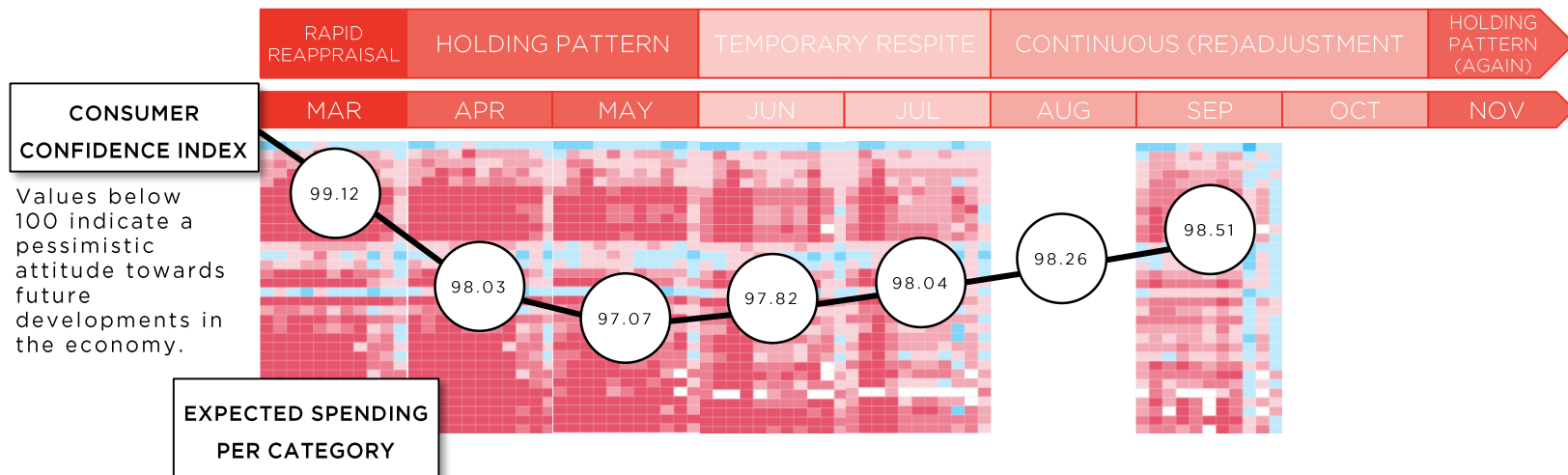


**There isn't one COVID-19 story. There are 7.5bn**



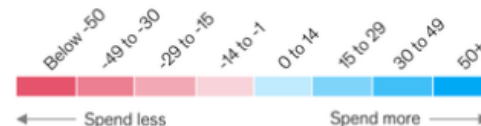


*Purchase intent directly reflected confidence*



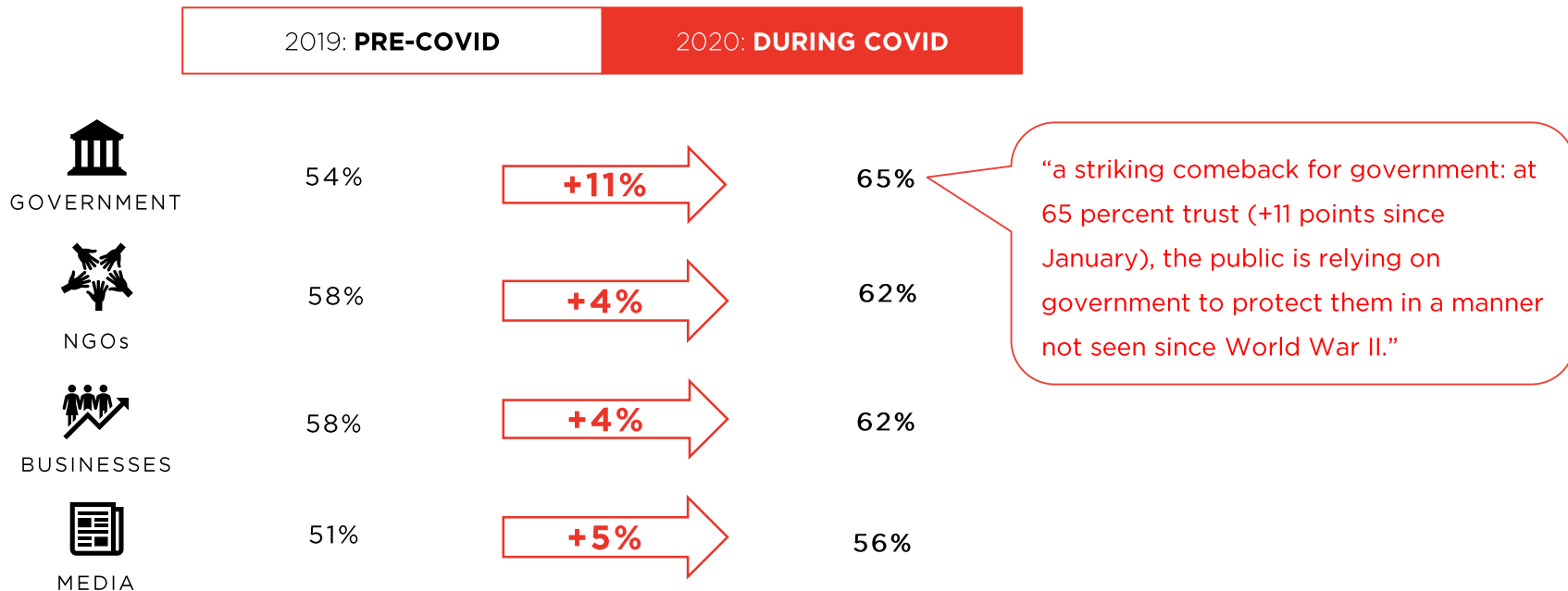
**Expected spending by category:** “Over the next two weeks do you expect that you will spend more, about the same, or less money on these categories than usual?”

McKinsey Consumer data. To explore results in detail – by category and by market please [click here](#).

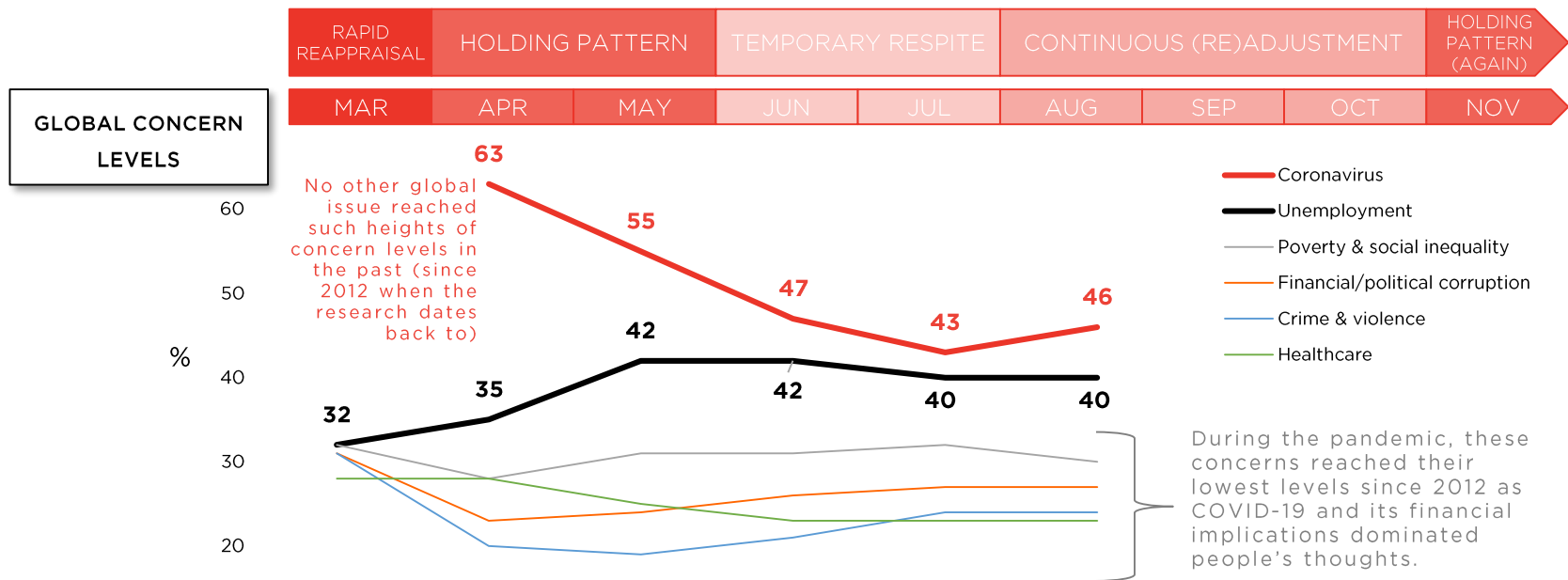


# SENTIMENT IMPACT: RISE IN TRUST ACROSS ALL INSTITUTIONS

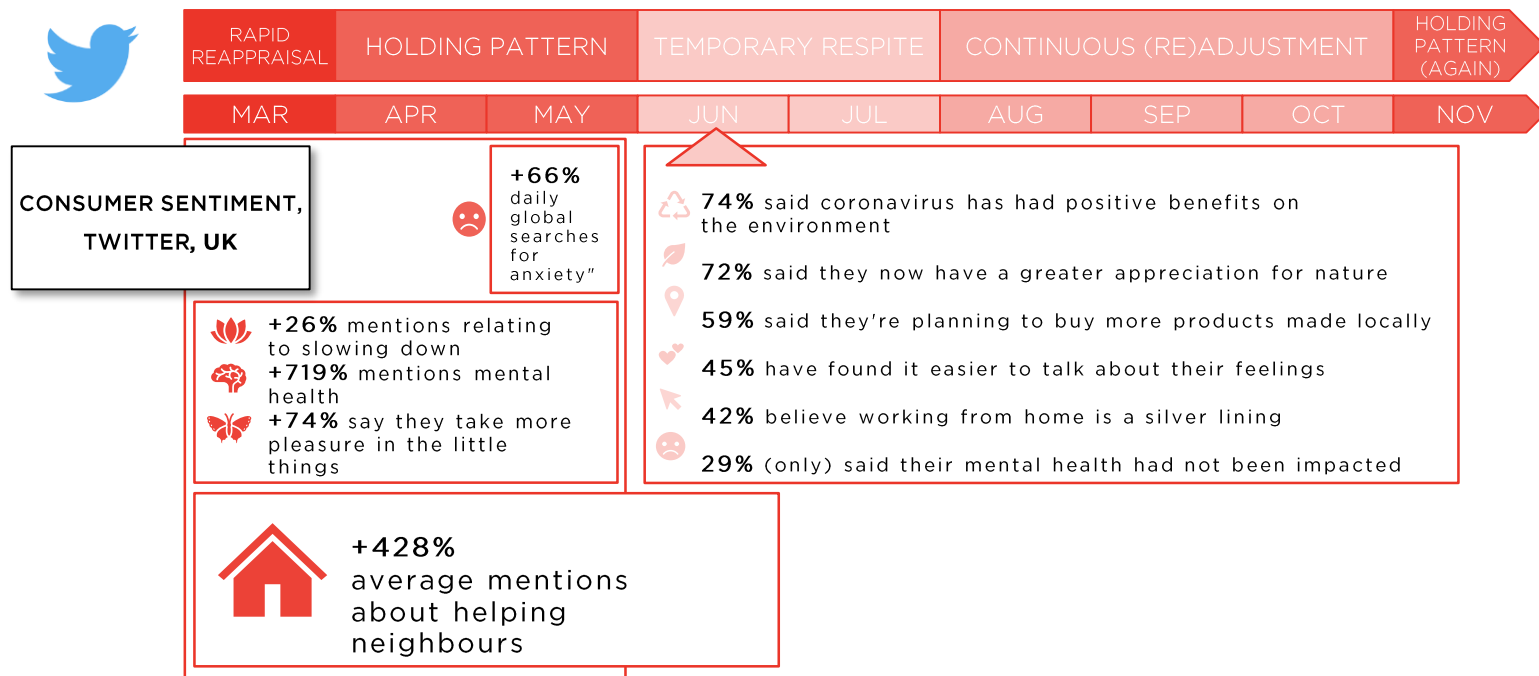
*Government sees the highest increase*



*Health and employment by and large overshadowed all other concerns*



*Twitter analysis reveals a complex picture*



Twitter data, UK 2020, [Link](#)

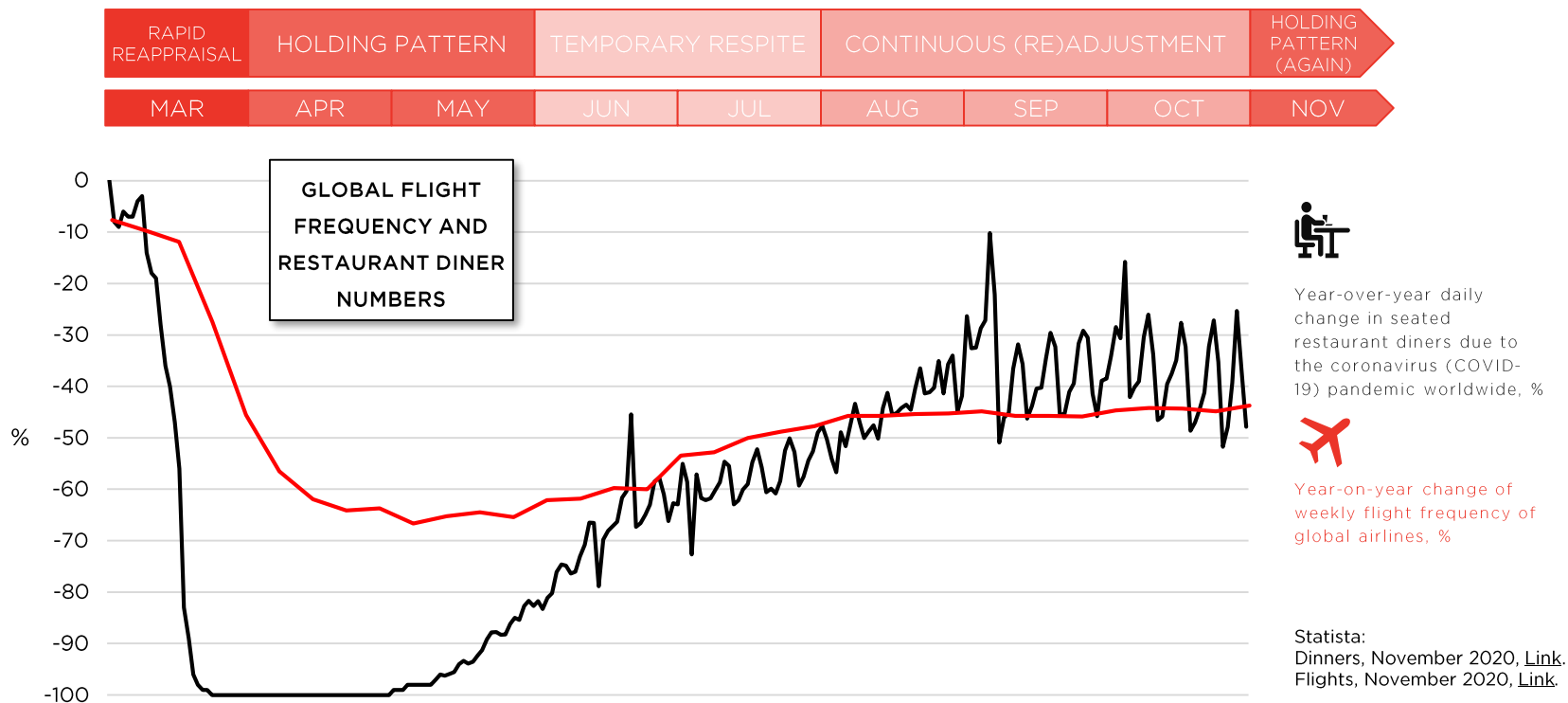
\* UK only data

*Google searches – rising – worldwide*



PRE-COVID NORMAL			RAPID REAPPRAISAL	HOLDING PATTERN		TEMPORARY RESPITE		CONTINUOUS (RE)ADJUSTMENT			HOLDING PATTERN (AGAIN)
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	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	

*Sharp decrease in travel and eating out, still not recovered*



*How we adapted in the early days of the pandemic*

**NEWS**

WATCHING MORE  
NEWS COVERAGE

**ALT. TRANSPORT**

INTERESTED IN  
USING ALTERNATIVES TO  
PUBLIC TRANSPORT

**STREAMING**

WATCHING MORE  
SHOWS/FILMS ON  
STREAMING SERVICES

**STAYCATIONS**

EXPECTING TO TAKE  
A DOMESTIC VACATION IN  
THE NEXT 12 MONTHS

**EXERCISING IN**

EXERCISING AT HOME

**SOCIAL MEDIA**

SPENDING LONGER  
ON SOCIAL (INSTA, FB,  
TWITTER)

**COOKING**

COOKING MORE

**EATING IN**

PLANNING TO EAT LESS  
IN RESTAURANTS  
AFTER THE OUTBREAK

**MESSAGING**

SPENDING LONGER  
ON MESSAGING SERVICES  
(FB, WHATSAPP)

**WATCHING TV**

WATCHING MORE  
BROADCAST TV

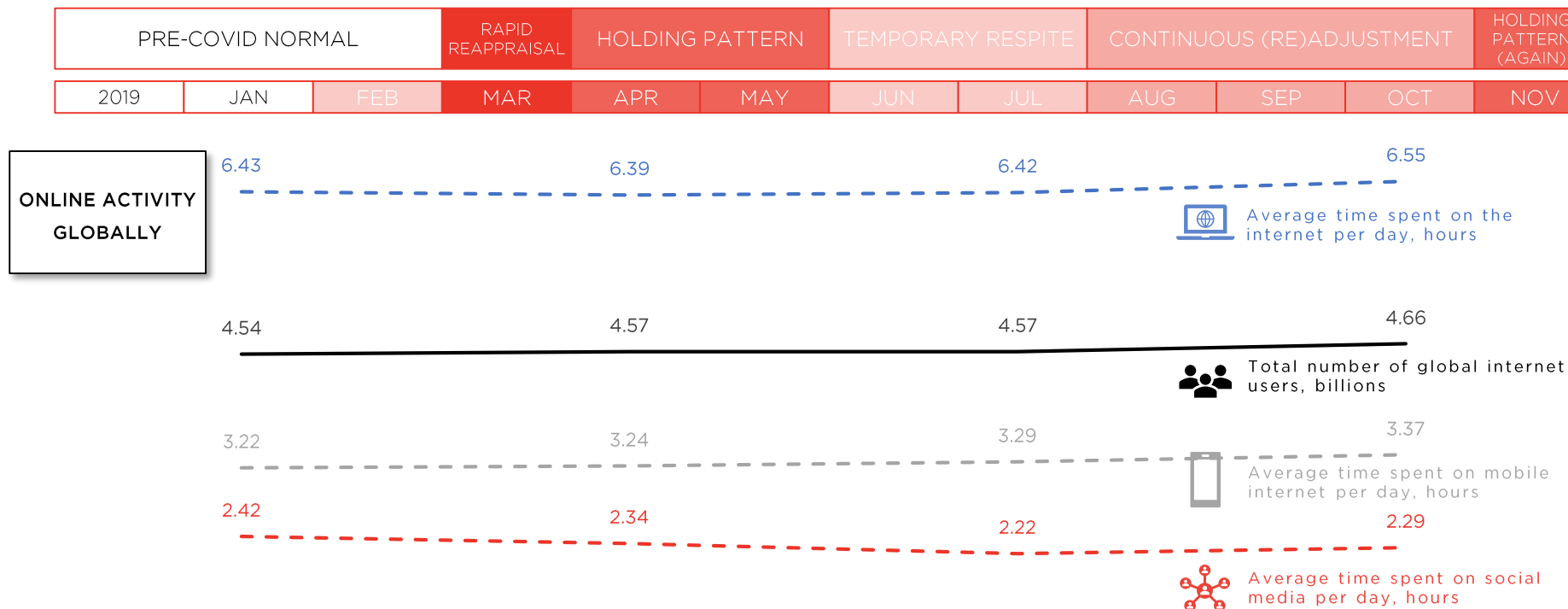
**GAMING**

PLAYING MORE  
GAMES  
ON SOCIAL

**UPSKILLING**

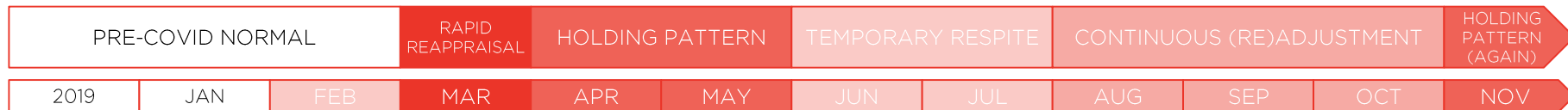
SPENDING MORE TIME  
USING ONLINE  
LEARNING PLATFORMS

*We stayed online for connection & distraction*

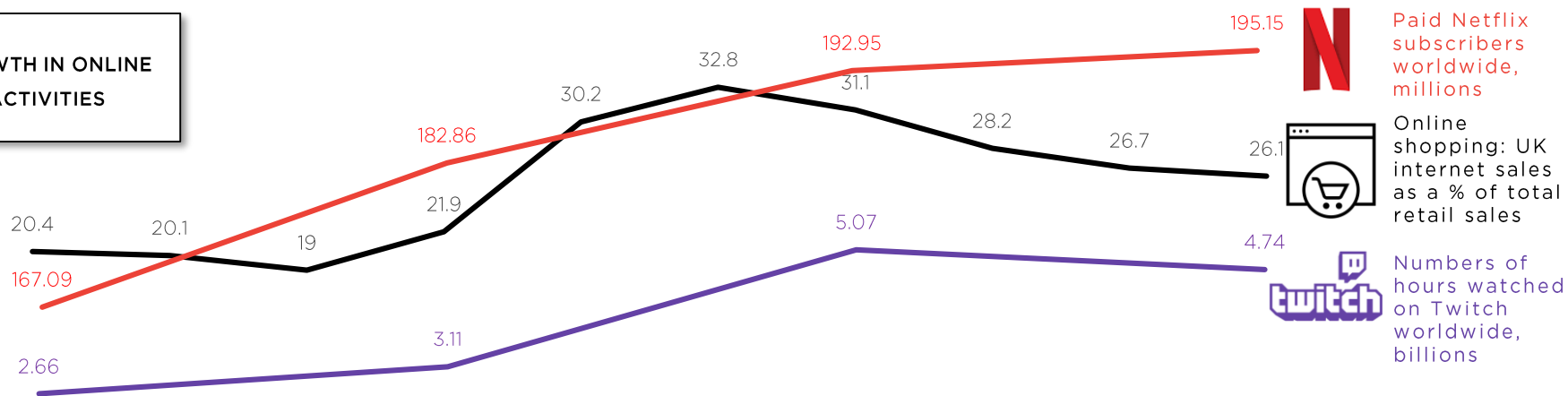




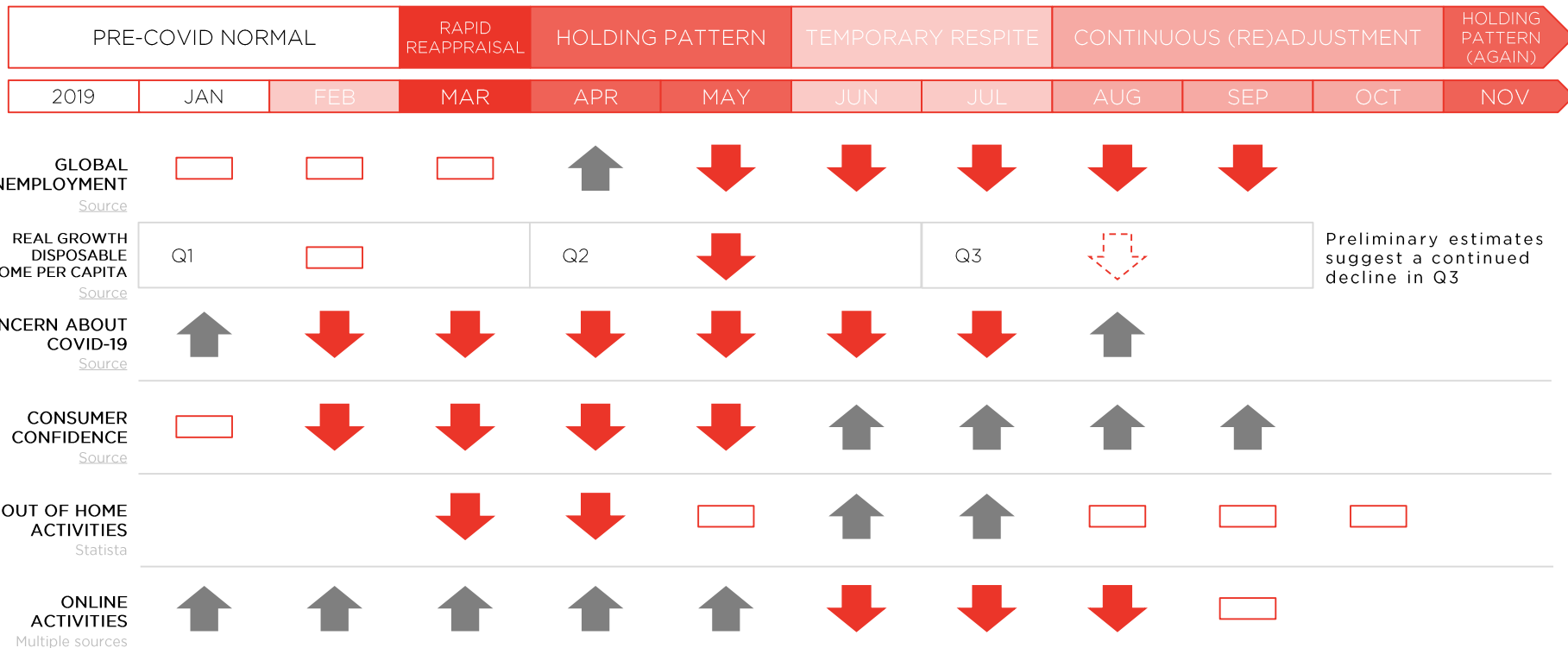
*People flocked online to shop and escape*



**GROWTH IN ONLINE ACTIVITIES**



*Charting consumer behaviour and sentiment*









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# MEDIA AND BRANDS

*Charting brand spend & responses*

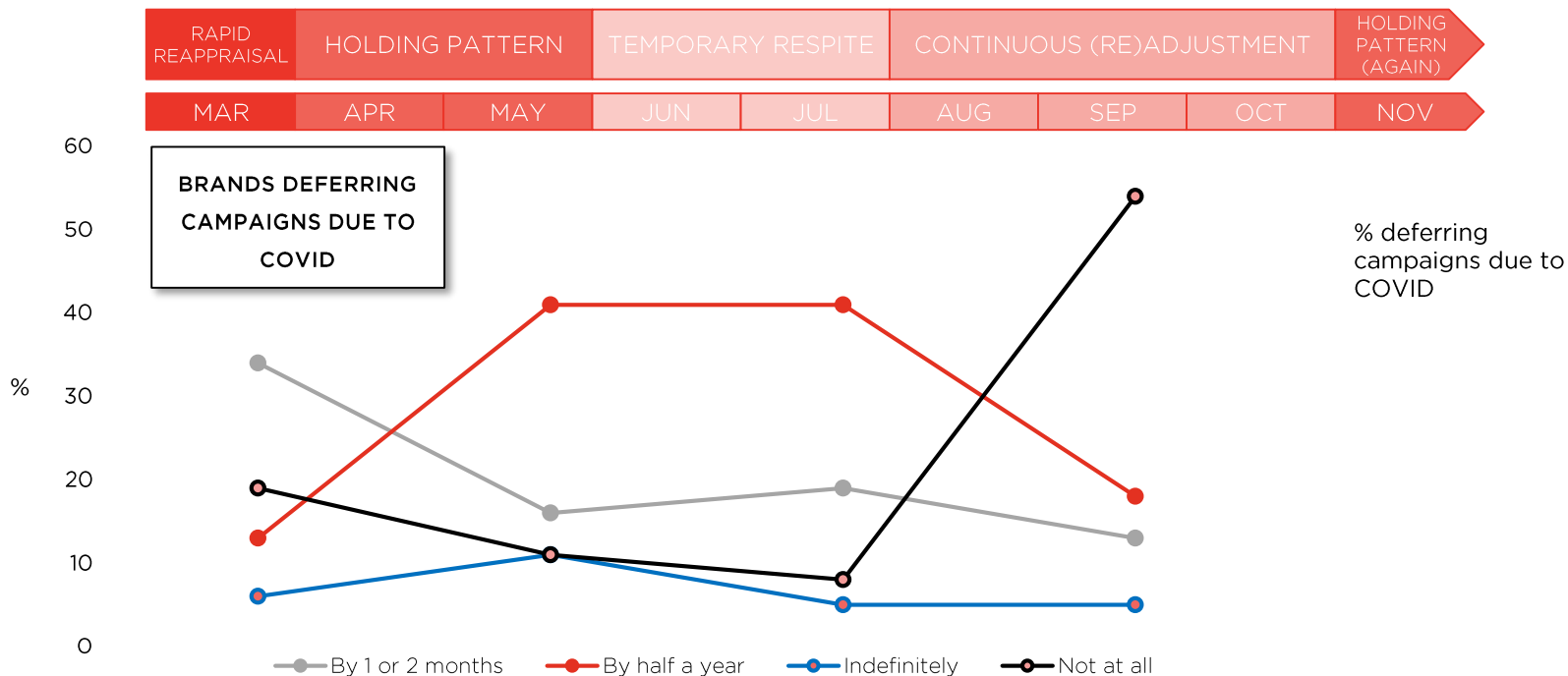
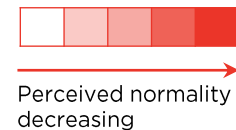


	2019: PRE-COVID		2020: DURING COVID
 拼多多 PINDUODUO	\$ 121.80	+34%	\$ 162.94
 amazon	\$ 446.68	+16%	\$ 516.83
 Tencent 腾讯	\$242.48	+11%	\$268.07
 阿里巴巴 Alibaba.com	\$762.77	+4%	\$816.61
 YouTube	\$480.37	+4%	\$499.21
 f	\$2,208.75	+3%	\$2,274.18

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

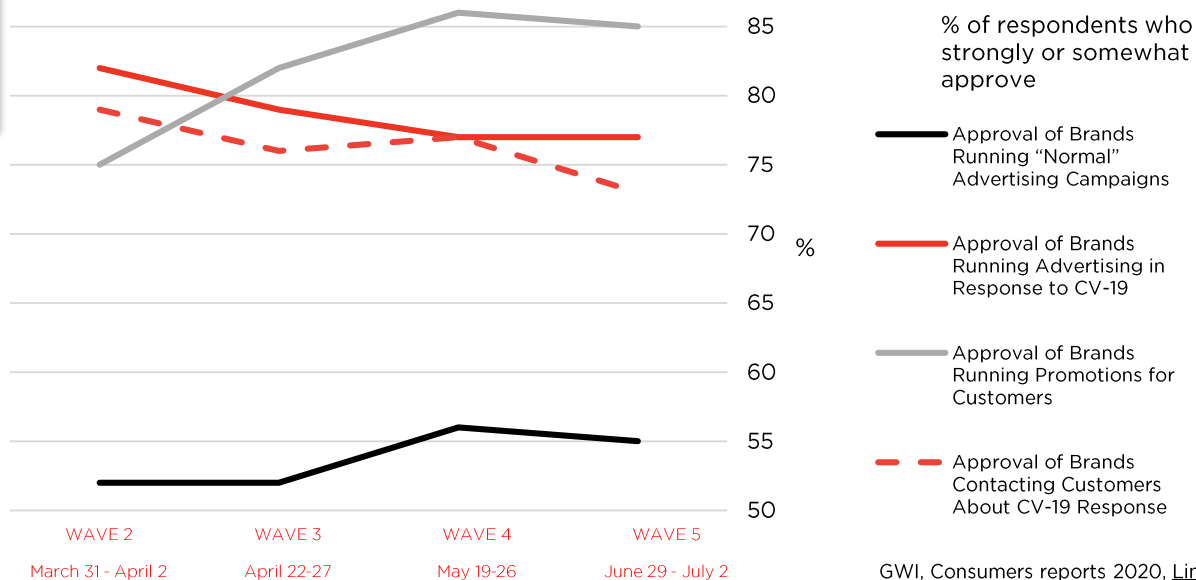
*But more than half of advertisers are no longer deferring campaigns*



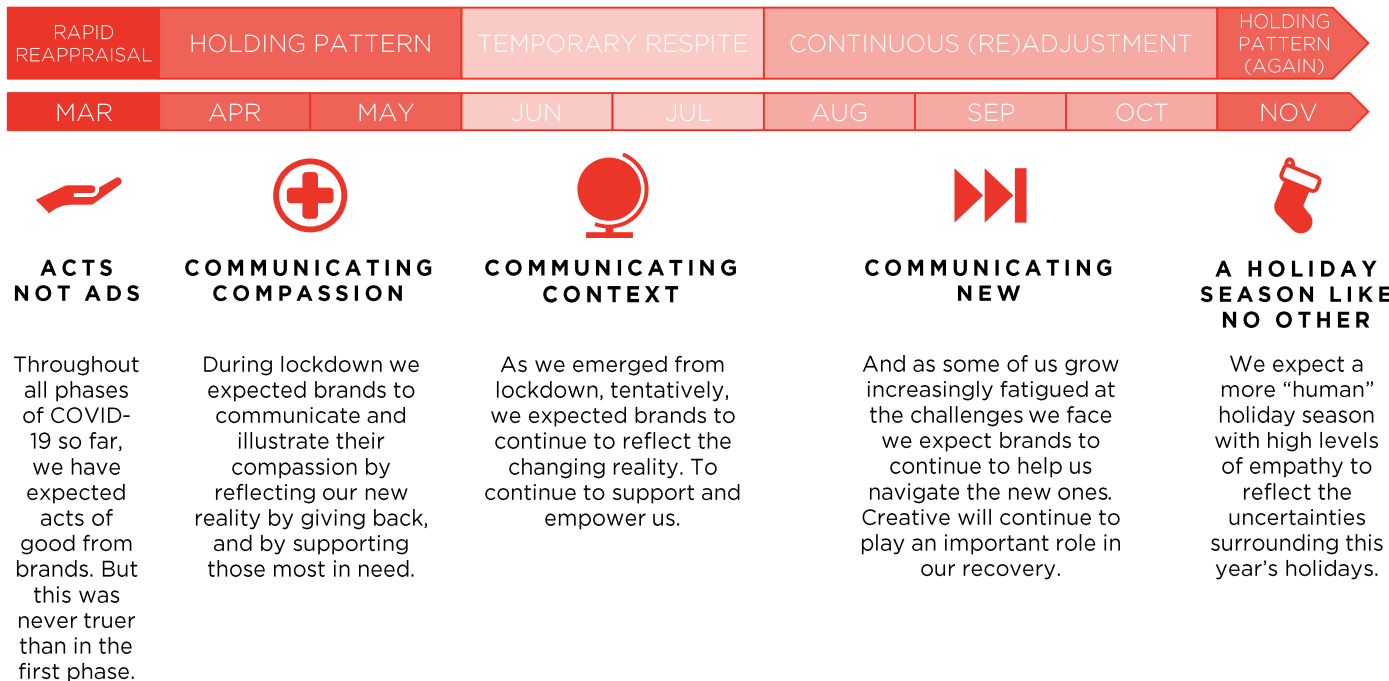
*As the circumstances evolved*



## APPROVAL OF VARIOUS TYPES OF BRAND COMMUNICATION



*Evolved to reflect people's needs of the moment*



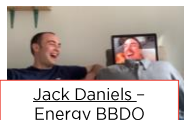
*The work*

**ACTS  
NOT ADS**

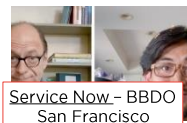

Juplier - BBDO  
Belgium



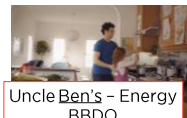
Visa - BBDO NY



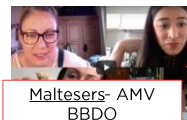
Jack Daniels -  
Energy BBDO


**COMMUNICATING  
COMPASSION**


Service Now - BBDO  
San Francisco



Uncle Ben's - Energy  
BBDO



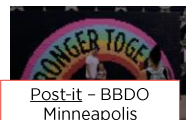
Maltesers- AMV  
BBDO


**COMMUNICATING  
CONTEXT**


P&G- BBDO  
Indonesia



Uncle Ben's - Energy  
BBDO



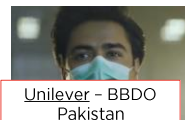
Post-it - BBDO  
Minneapolis


**COMMUNICATING NEW**

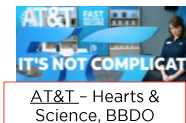

Google - Redwood  
UK



Snickers - BBDO NY



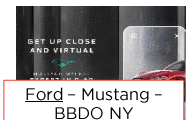
Unilever - BBDO  
Pakistan



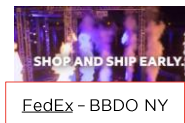
AT&T - Hearts &  
Science, BBDO



Jack Daniel's -  
Energy BBDO



Ford - Mustang -  
BBDO NY


**A HOLIDAY  
SEASON LIKE  
NO OTHER**


FedEx - BBDO NY



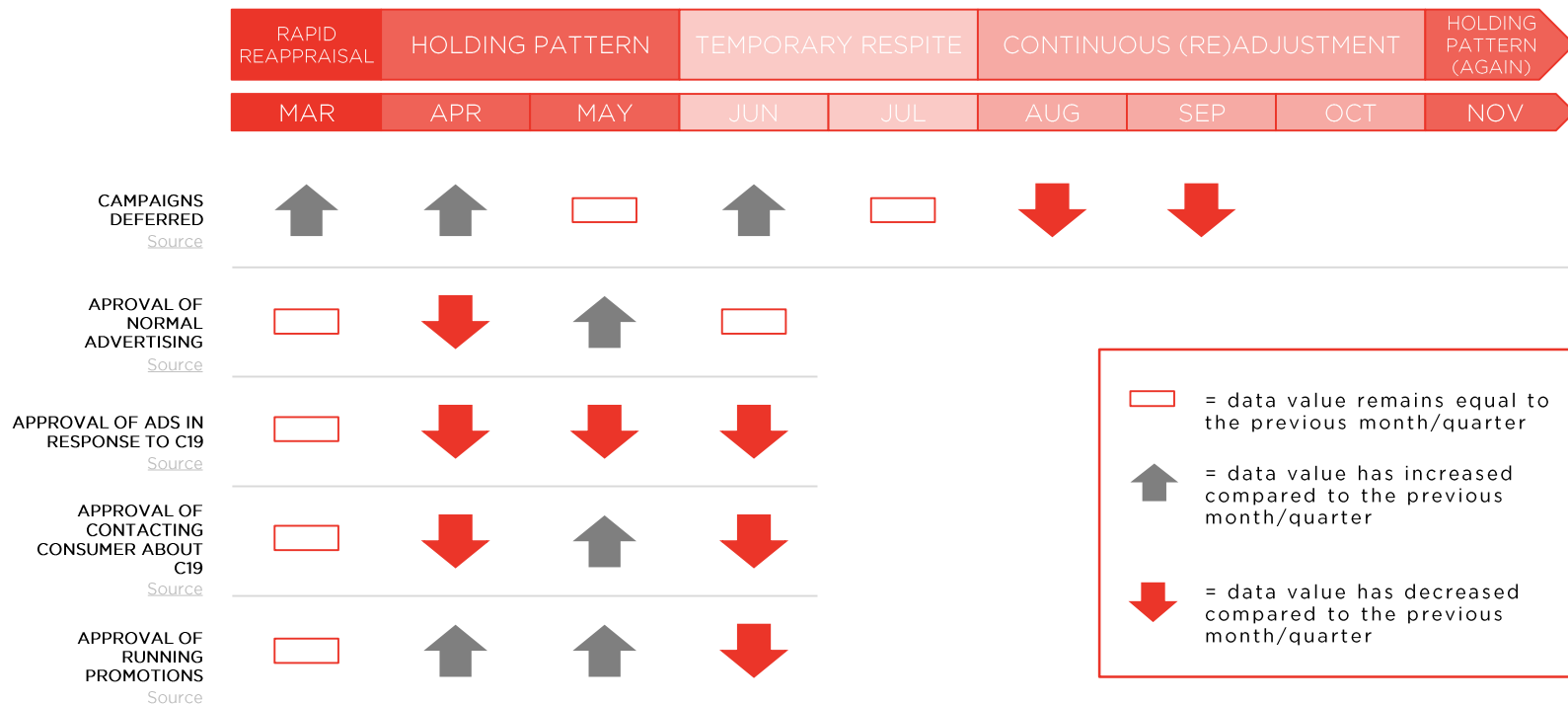
ASDA - AMV BBDO



MYER - Clemenger  
BBDO



## Charting brand responses



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

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

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

*Our COVID-19 coverage, papers per month*



PRE-COVID NORMAL		RAPID REAPPRAISAL		HOLDING PATTERN		TEMPORARY RESPITE		CONTINUOUS (RE)ADJUSTMENT			HOLDING PATTERN (AGAIN)
2019	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV



**\* PLEASE REQUEST ANY OF THE PAPERS YOU MISSED:**

BBDO KNOWS CORONAVIRUS  
 BBDO KNOWS COVID-19 - TELCO  
 BBDO KNOWS COVID-19 - RETAIL  
 BBDO KNOWS COVID-19 - TRAVEL  
 BBDO KNOWS COVID-19 - BRAND RESPONSES  
 BBDO KNOWS COVID-19 - BANKING  
 BBDO KNOWS COVID-19 - LIFE AT HOME  
 BBDO KNOWS COVID-19 - AN ARGUMENT IN FAVOUR OF...  
 BBDO KNOWS COVID-19 - WHAT'S NEXT  
 BBDO KNOWS COVID-19 - SCENARIO PLANNING  
 BBDO KNOWS COVID-19 - BRAND NOW & NEXT

BBDO KNOWS COVID-19 - 5 EMOTIONAL DRIVERS  
 BBDO KNOWS COVID-19 - THE CATEGORY IMPACT  
 BBDO KNOWS COVID-19 - THE FUTURE OF WORK  
 BBDO KNOWS COVID-19 - A GENERATIONAL VIEW  
 BBDO KNOWS COVID-19 - VACATIONS  
 BBDO KNOWS COVID-19 - OCCASIONS PART 1  
 BBDO KNOWS COVID-19 - OCCASIONS PART 2  
 BBDO KNOWS COVID-19 - CREATIVE IN THE TIME OF COVID  
 BBDO KNOWS COVID-19 - THE B2B OPPORTUNITY  
 BBDO KNOWS COVID-19 - HEALTH & CARE, NOW & NEXT  
 BBDO KNOWS COVID-19 - CHARTING THE PANDEMIC