

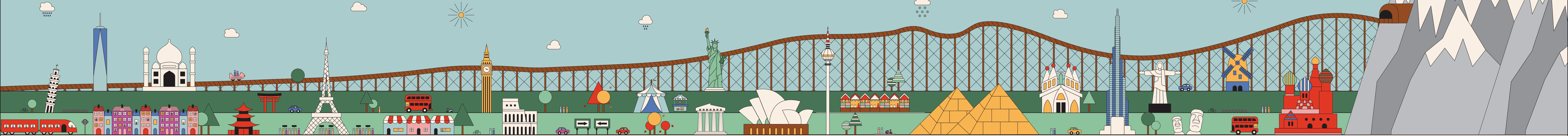
Tracking Culture Through Crisis

Gripped by a once-in-a-lifetime pandemic, people around the world have increasingly turned to data to navigate the uncertainty of the public health crisis. The Truth About Culture and COVID-19 tracks the dynamics of culture through this global crisis and provides marketers with a roadmap to resilience, recovery, and renewal.

This timeline reveals key findings generated across ten waves of research, inclusive of cultural signposts and modalities for brand activities. This ongoing initiative is being conducted by McCann Worldgroup Truth Central with 130,000+ respondents in 18 countries: Argentina, Brazil, Canada, Chile, China, Colombia, France, Germany, India, Italy, Japan, Mexico, Russia, South Africa, Spain, Turkey, U.K., and U.S.

About McCann Worldgroup: McCann Worldgroup, part of the Interpublic Group (NYSE: IPG), is a leading global marketing solutions network with over 20,000 employees united across 100+ countries by a single vision: To help brands play a meaningful role in people's lives. The network comprises McCann, MRM, Momentum Worldwide, McCann Health, Craft, Weber Shandwick, and FutureBrand.

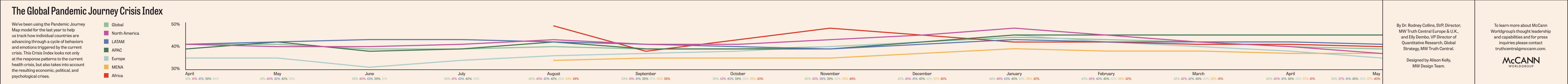
About McCann Worldgroup Truth Central: Truth Central is McCann Worldgroup's global intelligence unit, with representation in more than 100 countries. MW Truth Central's mission is to create original research that unearths the truths driving people's behaviours and attitudes about life, brands, and marketing.



March State of Denial | **April** Reality Dawns | **May** The Coronacoaster | **June** Fighting a Second Pandemic | **July** Moving into a New World of Adaptation | **August** Politicization of a Pandemic | **September** Life Interrupted or Life Accelerated | **October** Finding the Light | **November** Sink or Swim | **December** Optimism Fuels Resilience | **January** Reality Bites | **February** New Barriers to Wellness | **March** Spring Forward | **April** Uneven Recovery | **May** One Pandemic, 7.6B Experiences | **The Future** The World Will Be Forever Changed | **Looking Ahead**

<p>In March, few people had made any changes to everyday life as China entered its second month of lockdown. Even fewer imagined that the virus was a reality that they would face.</p> <p>37% of people globally believe the media is creating unnecessary hysteria.</p> <p>Brands on the Frontline</p>	<p>Lockdown became the norm as a new reality dawned. In March, 59% of people globally stayed away from public places. By April, 73% of people globally avoided public places as daily cases reach almost 900,000.</p> <p>18% of people globally believe that they will be ok if they get Coronavirus.</p> <p>Brands in Chorus</p>	<p>Beyond immediate health concerns, a delicate balance is struck as people weigh fear against hope—confidence and worry ebb and flow with no clear end to the cascading crises.</p> <p>34% of people globally say they feel more anxious than they did before.</p> <p>Brands as Therapists</p>	<p>As the virus disproportionately affects the vulnerable and disenfranchised, the health crisis exposes deep social inequalities.</p> <p>26% of people globally believe that social divides are a worse threat than COVID-19.</p> <p>Brands as Allies</p>	<p>Re-opening reveals a range of attitudes towards rules and guidelines as people adapt to pandemic conditions.</p> <p>The Cautious: 50% ↑ Following the rules The Conditionals: 21% The Careless: 6% The Contrarians: 13% The Clueless: 9% ↓ Unaware of the rules</p> <p>Brands as Innovators</p>	<p>Confidence in governments around the world shrinks with few exceptions.</p> <p>"My Government Has Let Us Down"</p> <table border="1"> <tr> <td>Global</td> <td>24%</td> <td>27%</td> <td>28%</td> </tr> <tr> <td>U.S.</td> <td>35%</td> <td>43%</td> <td>43%</td> </tr> <tr> <td>China</td> <td>9%</td> <td>16%</td> <td>10%</td> </tr> <tr> <td>May</td> <td>Jul.</td> <td>Aug.</td> <td></td> </tr> </table> <p>Brands as Trustmakers</p>	Global	24%	27%	28%	U.S.	35%	43%	43%	China	9%	16%	10%	May	Jul.	Aug.		<p>The pandemic proves to be a source of interruption and acceleration.</p> <p>26% of people globally feel like they can't plan for their futures right now.</p> <p>23% of people globally say they're making life changes faster than they were before.</p> <p>Brands as Anchors</p>	<p>Amid the darkness, people everywhere are trying to find the light.</p> <p>42% of people globally hope that the biggest lasting positive change of this crisis will be that people will appreciate the little things in life.</p> <p>Brands as Comforters</p>	<p>Governments are being increasingly outpaced by the scale and speed of this crisis.</p> <p>How prepared would you say your country is to deal with COVID-19?</p> <table border="1"> <tr> <td>Mar. '20</td> <td>30%</td> <td>64%</td> <td>25%</td> <td>26%</td> <td>33%</td> </tr> <tr> <td>Nov. 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U.S.	U.K.	Ger.		<p>With the advent of successful vaccines, optimism is on the rise.</p> <p>64% of people globally believe that things are only going to get better, up from 57% in October.</p> <p>Brands as Joy-Makers</p>	<p>Lockdown fatigue and general frustration with the state of the pandemic makes clear that the psychological crisis will last well beyond the pandemic.</p> <p>This was revealed when we asked people which song best summarized 2020: #1 Dúo Dinámico, <i>Resistiré</i> #2 John Lennon, <i>Imagine</i> #3 Lara Fabian, <i>Je suis Malade</i></p> <p>Brands as Empathizers</p>	<p>In these challenging times, there is a wide variety of interconnected barriers standing between us and a true sense of wellness.</p> <p>23% of people globally say that the #1 barrier to wellness is a lack of time/busy schedule, followed by a lack of willpower, and the economic situation.</p> <p>Brands as Stress-Relievers</p>	<p>Young people are leading the charge to a new tomorrow, one that looks ahead vs. merely reversing course to the way things were.</p> <p>Gen Z globally is more likely to say they're scared of society staying the same (53%) vs. society changing drastically (47%).</p> <p>Brands as Works in Progress</p>	<p>Vaccine progress prompted optimism about aspects of recovery, but economic fears remain.</p> <p>Over 1/2 of people globally are concerned that the economy will suffer as a result of the Coronavirus pandemic.</p> <p>Brands in Waiting</p>	<p>While some countries are starting to return to normal, uneven vaccine distribution, new variants and local spikes and lockdowns have left the world in varying stages of crisis.</p> <p>How prepared would you say your country is to deal with COVID-19?</p> <table border="1"> <tr> <td>Apr. 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<p>From producing PPE to feeding essential workers, many brands take an active role in redressing the crisis as the pandemic overwhelms institutions and supply chains.</p> <p>81% of people globally believe that global brands can play a meaningful role in the world.</p> <p>Brands as Frontline</p>	<p>In a generalised state of panic, few brands are ready to stand out. Messaging becomes formulaic and people turn to other sources for inspiration and uplift.</p> <p>22% of people globally are not inspired by the creativity they've seen from brands.</p> <p>Brands in Chorus</p>	<p>The role of brands as empathetic leaders is more welcome than ever. Providing support services or spreading cheer is a valuable contribution to counter the tumult of the coronacoaster.</p> <p>49% of people globally want a brand that provides them with dreams.</p> <p>51% of people globally want a brand that understands their frustrations.</p> <p>Brands as Therapists</p>	<p>As we witness cascading crises, the economic crisis has in some cases outpaced the public health crisis. 30% of people globally are concerned they will lose their job or struggle financially.</p> <p>59% of people globally say that the most important thing a brand can do is to "look after their employees."</p> <p>Brands as Allies</p>	<p>People have a range of attitudes towards reopening: 29% of people globally think we're reopening society too quickly. Brands must adapt to these new circumstances with innovation and agility.</p> <p>32% of people globally believe this crisis will inspire new innovations.</p> <p>Brands as Innovators</p>	<p>In the midst of a Trust Recession, brands have remained relatively unscathed: just 18% of people globally say that they have lost trust in brands and businesses.</p> <p>51% of people have lost trust in politicians and governments.</p> <p>Brands as Trustmakers</p>	<p>The health crisis may come to an end, but the decisions people make now will affect their futures. Brands need to provide confidence and security to ensure continued relevance.</p> <p>72% of people globally say that when this crisis is over, they will be more cautious about how they spend money.</p> <p>Brands as Anchors</p>	<p>As the pandemic rages on, people seek comfort:</p> <p>76% of people globally say it's more meaningful for a brand to reassure them than challenge them.</p> <p>Brands as Comforters</p>	<p>As trust in governments continues to erode, there is an opportunity for brands to provide stability.</p> <p>32% of people globally say that the coronavirus pandemic has revealed a lack of leadership.</p> <p>Brands as Stabilizers</p>	<p>The gravity of the ongoing crises has revealed an opening for joy and levity, buoyed by hopes for a better year in 2021.</p> <p>34% of people globally say they want brands to cheer people up and spread happiness.</p> <p>Brands as Joy-Makers</p>	<p>The pandemic has accelerated the trend towards a more holistic view of wellness and increased value placed on mental health.</p> <p>The #1 thing brands and businesses can do to help in the crisis remains to be to look after their employees.</p> <p>Brands as Empathizers</p>	<p>People are looking for help and wellness support wherever they can get it. All brands must now actively consider their roles as wellness partners with the potential to alleviate stresses wherever possible.</p> <p>1/2 of people globally agree that stress is their biggest threat to wellness.</p> <p>Brands as Stress-Relievers</p>	<p>There is a common sentiment among young people today that they have ability to help transform brands into true allies to create a better future.</p> <p>3/4 of Gen Z globally believe their generation has the power to influence a global brand's actions and behaviors.</p> <p>Brands as Works in Progress</p>	<p>The economic realities of the past 18 months have some excited to go out and spend on experiences while others are still focused on the essentials.</p> <p>People are most excited to spend money on travel (41%) and entertainment (31%) but 32% of people globally say they are not planning to spend on non-essentials.</p> <p>Brands in Waiting</p>	<p>Given the evolving nature of challenges associated with COVID-19, the need for leadership and support remains as important as ever. Many are looking to brands to help fill a perceived leadership vacuum and use their platforms for positive change.</p> <p>77% of people globally believe that global brands have a greater ability to create positive change than the government does.</p> <p>Brands in The Spotlight</p>	<p>Tracking culture through crisis is your brand's compass for resilience, recovery, and renewal.</p> <ol style="list-style-type: none"> 1. Take an interdisciplinary approach to responding and leading in crisis. 2. Learn from countries and companies who show success. 3. Universal human truths provide constancy as well as local relevance. 4. Fortify your brand's Meaningful Role to earn your place in people's lives. <p>Brand Compass</p>	<p>Your Role</p>
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Designed by Alison Kelly, MW Design Team.

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