A GUIDE TO PROFESSIONAL COMMUNICATORS: USA EDITION
WHEREAS:

• China is 7-8 weeks ahead of the western world in terms of its epidemic stage as currently reported by both the media and healthcare experts.

• China has “flattened the curve” of the pandemic’s growth and mortality rates while Western countries seek to manage domestic outbreaks with varying degrees of success

• Traditional and social media simultaneously and uniquely reflect and shape public opinion

THEREFORE:

• Traditional and social media are useful gauges of what’s happening now with Covid-19 and of the patterns that may continue to emerge in the future.

• We must apply rigorous analysis against global and national journalistic and social media content to uncover insights into the pandemic and revelations upon which to plan and execute business/communications decisions going forward.

• As the volume and velocity of Covid-19 news, commentary and conversations in the media subside, the resulting earned media vacuum presents possibilities for alternative topics, some of which may be fulfilled with proactive – even fun – content which may seem inappropriate in the current environment.
A NOTE TO THE READER:

- This report reflects the findings of a media content analysis of journalistic news and social media juxtaposed against global COVID-19 cases data tracked and forecasted by the Coronavirus Resource Center’s at Johns Hopkins University (JHU) and its Center for Systems Science and Engineering (CSSW). All Coronavirus case data is attributable to Johns Hopkins University.

- The Coronavirus case and media trends which are the foundation of this analysis portend earned media opportunities in the days following the flattening of infection and mortality rates. Just as these rates change from one country to the next, so do the pace and extent of earned media opportunities. We do not assert our expertise in predicting the infections curves: we suggest only conditionally that if the infection and media patterns in the USA, China, Italy, France, Germany, Spain and the UK reflect trends in these and other countries, we can expect certain pathways to emerge across all countries. As such, please consider these findings “directional” rather than “statistically significant”.

- Please keep in mind that both Coronavirus and media trends are shown at the national rather than local level. While certain locales may see infections and coverage continue to surge, other parts of the country may experience a flatter curve more quickly. As such, deceleration in one area within a country may offset local surges in another. The data reflects the countries in aggregate.

- We recognize that traditional media in China operate in a state-controlled environment unlike the USA, UK, Spain, Italy, Germany and France where press freedoms are guaranteed. Also, while journalistic media promises to be “fair and balanced,” social media content is more open and, therefore, more indicative of public opinion and societal trends in general.
## SCOPE & METHODOLOGY

<table>
<thead>
<tr>
<th>MARKETS</th>
<th>MEDIA SCOPE</th>
<th>METRICS / EARNED MEDIA VISIBILITY</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>50,000+ TRADITIONAL PRINT, ONLINE (ALL COUNTRIES), TV, RADIO &amp; PODCAST MEDIA (INTL ONLY) + MAIN SOCIAL CHANNELS (INTL ONLY) WECHAT, Baidu, Twitter, Facebook, Instagram &amp; LinkedIn</td>
<td>MEDIA VISIBILITY = GROSS REACH POTENTIAL NUMBER OF INDIVIDUALS EXPOSED TO AN EARNED MEDIA MESSAGE IN AGGREGATE OVER TIME</td>
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<td>EU G5</td>
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<td>CHINA</td>
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**CORONAVIRUS COVID-19 GLOBAL CASES AS TRACKED AND FORECASTED BY THE CENTER FOR SYSTEMS SCIENCE AND ENGINEERING (CSSE) AT JOHNS HOPKINS UNIVERSITY (JHU)**
I. EXECUTIVE SUMMARY: INSIGHTS AND GUIDANCE
COVID-19 OBSERVATIONS:

- Lockdowns, social distancing and travel bans are helping to “flatten the curve”
- New insights emerge on how the virus spreads and how to protect against new infections
- China has “flattened the curve” of the pandemic's growth while Western countries seek to manage domestic outbreaks, with each country battling frequency and velocity with different results

MEDIA TRENDS:

- **USA:** New infections drop but mortality continues to climb. Nevertheless, emerging signs of a recovery.
- **China:** Immediate opportunities under current favorable conditions
- **Italy:** Favorable trends for new infections, mortality and media coverage. But with strict lockdown measures in place, the threat is present. Organizations must be careful with their communications.
- **Germany:** New infections decline while mortality slightly increases. Mortality is low. The gap between infections and media focus is the largest in the study which indicates opportunities for proactive PR
- **Spain:** Infection rate still relatively high; new infections are down as is mortality. Media coverage stays shows slight decrease compared to previous week. Prepare now for proactive PR when signs improve
- **France:** France has new infections and mortality under control, yet infection rate remains high. Act now with proactive PR with a focus on corporate social responsibility and contributions to Covid-19 related issues
- **UK:** New infections and mortality are stable. Media coverage drops compared to previous weeks as the Queen’s speech fades and PM Johnson recovers. Infection rate remains high. Stand by for more favorable conditions

### Strategic Guidance

<table>
<thead>
<tr>
<th>PHASES</th>
<th>MEDIA &amp; AUDIENCE</th>
<th>CORPORATE COMMUNICATIONS</th>
<th>MANAGEMENT COMMUNICATIONS</th>
<th>PRODUCT COMMUNICATIONS</th>
</tr>
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<tbody>
<tr>
<td><strong>PHASE I: DETECTION</strong></td>
<td></td>
<td></td>
<td>NO CHANGES</td>
<td></td>
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<tr>
<td><strong>PHASE II PREPARATION &amp; PREVENTION</strong></td>
<td>• Media and readers in crisis-mode&lt;br&gt;• Majority of topics COVID-related</td>
<td>• Corporate Citizenship topics appreciated by readers and media&lt;br&gt;• Reduce classical corporate topics to minimum&lt;br&gt;• Important: Use time to create new, digital communications formats for Phase III</td>
<td>MANAGEMENT PLATFORMS:&lt;br&gt;• Leadership&lt;br&gt;• Transparency, reassurance and affirmation&lt;br&gt;• Corporate Citizenship</td>
<td>IMPORTANT:&lt;br&gt;• Unless directly relevant to mitigation, &quot;promotional&quot; and product coverage should be moved to Phase III&lt;br&gt;• Channel-load Phase III&lt;br&gt;• Create new, digital comms formats for Phase III</td>
</tr>
<tr>
<td><strong>PHASE III CONTAINMENT, MITIGATION &amp; DAMAGE CONTROL</strong></td>
<td>• Increasing allowance for non-corona coverage&lt;br&gt;• People still in quarantine with time for news consumption</td>
<td>• Begin to introduce a broader set of corporate stakeholder topics&lt;br&gt;• Employees&lt;br&gt;• Customers&lt;br&gt;• Investors&lt;br&gt;• Regulators/legislators</td>
<td>MANAGEMENT PLATFORMS:&lt;br&gt;• Leadership&lt;br&gt;• Transparency, reassurance and affirmation&lt;br&gt;• Corporate Citizenship</td>
<td>• Run new, digital formats&lt;br&gt;• Provide your customers with alternative, new formats&lt;br&gt;• Promote digital sales: contactless business will be trending</td>
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<tr>
<td><strong>PHASE IV RECOVERY &amp; REPAIR</strong></td>
<td>• Less time for news consumption&lt;br&gt;• Back to work</td>
<td>• &quot;Restart/reboot&quot; topics: start of production, sales, etc.&lt;br&gt;• Focus on the positive outcomes of the crisis</td>
<td>MANAGEMENT PLATFORMS:&lt;br&gt;• Stronger out of the crisis</td>
<td>IMPORTANT: There is no back to normal for product communications!&lt;br&gt;• Brand events and sponsorships limited for next few months due to social distancing&lt;br&gt;• Smaller interactions with journalists emerge: product reviews, test drives, etc.</td>
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COVID-19 coverage in Western markets peaked with announced containment measures. While developments in China suggest positive outcomes elsewhere, the peaks in coverage don’t mark a ‘turning point’ for Western communicators (yet).

Only China is poised for proactive “Phase III/IV” activity. For the West, the rates of total infections, new infections and mortality are the most important indicators. We advise waiting for all four boxes to turn green before Phase III communications commence.
Trump's official decision to freeze the U.S.'s W.H.O. funding drove global coverage this week as other global leaders stood in solidarity with W.H.O. leadership. Coverage reported that the decision would most heavily impact the world's most vulnerable populations in Sub-Saharan Africa, the Indian subcontinent, and Latin America. In a Tweet, Bill Gates called the decision "as dangerous as it sounds."

In the U.S., debates over re-opening the country continued to play out in the press as governors in the hard-hit areas formed regional blocs to guide decision-making and Trump took to Twitter to goad on right-wing protestors in Michigan and Minnesota advocating for an end to COVID-19 social distancing efforts. Governors continued to protest the federal government's lack of support as Trump ceded responsibility for testing to the states. Virginia Governor Ralph Northam (D) called Trump's assertion that states had sufficient testing capabilities 'delusional.' Maryland governor Larry Hogan (R) said it was 'absolutely false' that there was enough testing being done.
The media landscape continued to show little change even as countries and some U.S. states passed predicted peak resource use. In non-Covid-19 news this week, a new study concluded that conditions over the past decade in the southwestern United States met the criteria for a ‘megadrought.’ Only four periods in the past 1200 years classified as a ‘megadrought,’ and the current period is already worse than three of the recorded four.

Geographic distribution of coverage remained similar to previous weeks, with the U.S. leading.
Reopening the U.S. economy became a top topic over the past week, one which was tightly intertwined with testing.

Coverage marking the death of beloved teachers, elderly veterans, and other loved ones also emerged over the past week. The New York Times reported that an estimated 6,900 deaths had occurred in nursing homes. In New Jersey, one such facility drove national headlines after an anonymous tip stating that bodies were being stored in a shed led police to discover 17 bodies in an overflowing morgue. In Massachusetts, a veterans home came under investigation for its response as its death toll increased to 47. Education reporters described how some students were dealing with the death of their teachers while at home in isolation. The New York City Department of Education began reporting educator deaths this week, announcing the death of 50 individuals.

Coverage Topics by Category
Topics held relatively steady over the previous week, though the topic of reopening rose slightly.

Top Movers in Past Week:
Reopening +1%
Testing +2%
Fatalities -3%
‘Big Tech* and the 'Health/Pharmaceutical' industries saw the largest increases in their share of mentions in 2020YTD coverage. ‘Big Tech* saw the most significant increase with new coverage at +0.4% while ‘Health/Pharmaceuticals’ saw a +0.2% increase. The ‘Travel Industry’ and ‘Airlines’ saw the most significant decrease in share, as each industry declined -0.3%. If this trend for travel-related industries continues, it could suggest a shift by the media away from critical travel coverage which was their focus for much of the early phases of COVID-19. The remaining industries in coverage saw minimal to no change in share.

**INDUSTRIES IN COVERAGE 2020YTD**

Government/NGOs continue to be the focus in news media
III: INDIVIDUAL COUNTRY TRENDS AND STRATEGIC GUIDANCE

USA, CHINA, ITALY, GERMANY, SPAIN, FRANCE AND UK
NEW COVID-19 INFECTIONS, MORTALITY & MEDIA COVERAGE TREND // USA
USA CONTINUES TO BATTLE INCREASING MORTALITY RATES

- USA INFECTION RATES DECREASE FOR THE FIRST TIME;
- MEDIA COVERAGE ABOUT COVID-19 CONTINUES DOWNWARD TREND AFTER ANNOUNCEMENT OF SCHOOL CLOSINGS AND LOCKDOWNS
- ADVICE: FOCUS ON CREDIBLE COVID-19 COMMUNITY SERVICE-RELATED CONTENT; STAND BY FOR MORE FAVORABLE PANDEMIC TRENDS

The first US states begin school closings; prepare for lockdowns

LOCKDOWNS

COVID-19 SCORECARD

INFECTION RATE

HIGH

MORTALITY

MEDIA FOCUS

NEW COVID-19 MEDICA COVERAGE

NEW COVID-19 INFECTIONS

NEW COVID-19 DEATHS

...IN RESPECTIVE WEEK

PERIOD
FROM: FEB 10TH, 2020 TO: APRIL 19TH, 2020

DATA
TRACKED COVID-19 INFECTIONS (JOHNS HOPKINS UNIVERSITY)
MEDIA VISIBILITY (GROSS REACH) TRADITIONAL & SOCIAL

MARKETS
USA

UNIVERSE
ALL COVID-19 NEW TRACKED INFECTIONS ALL COVID-19 RELATED MEDIA COVERAGE

PIE CHART
TOOL TIPS

…IN RESPECTIVE WEEK
UNCERTAINTY WHETHER LOCKDOWNS WORK AND HOW THE VIRUS SPREADS SPARK THE "TURNING POINT" ~ 3 WEEKS AFTER LOCKDOWN-ANNOUNCEMENT

VIRUS-RELATED MEDIA COVERAGE IN CHINA RELAXES AS NEW INFECTIONS AND MORTALITY RATES SIGNIFICANTLY DECLINE

ADVICE: TRENDS FAVOR MORE DIVERSE NON-COVID-19 RELATED STORY LINES. ACT NOW

NEW COVID-19 INFECTIONS, MORTALITY & MEDIA COVERAGE TREND // CHINA

CHINA WITH LOW MORTALITY AND LOW INFECTION RATE

WUHAN LOCKDOWN
On 23 January 2020, the central government of China imposed a surprised lockdown in Wuhan and other cities in Hubei in an effort to quarantine the centre of an outbreak of coronavirus disease 2019 (COVID-19); this action is commonly referred to as the "Wuhan lockdown".

TURNING POINT
The 76-day lockdown ends on April 2nd, 2020.

COVID-19 SCORECARD
- Infection Rate
- New Infections
- Mortality
- Media Focus

LEGEND
- New COVID-19 Media Coverage
- New COVID-19 Infections
- New COVID-19 Deaths

PHASE I
DETECTION
PHASE II
PREVENTION
PHASE III
CONTAINMENT

DATA
TRACKED COVID-19 INFECTIONS (JOHNS HOPKINS UNIVERSITY)
MEDIA VISIBILITY (GROSS REACH)
TRADITIONAL & SOCIAL

PERIOD
FROM: JAN 6TH, 2020
TO: MARCH 30TH, 2020

MARKETS
CHINA

UNIVERSE
ALL COVID-19 NEW TRACKED INFECTIONS
ALL COVID-19 RELATED MEDIA COVERAGE
ITALY: DESPITE DECLINE IN NEW INFECTIONS, MORTALITY RATE IS A LAGGING INDICATOR

MEDIA ARE RELAXING FOCUS ON COVID-10 STORIES

ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS. BUT INDICATIONS SUGGEST PHASE III HAS BEGUN. ACT NOW.

ITALY WITH DECLINING NEW INFECTIONS AND SLIGHTLY DECLINING MORTALITY

ITALY issued a nationwide lockdown on March 9, ordering its 60 million residents to stay at home. Schools, universities and all non-essential businesses are closed — with supermarkets, banks, pharmacies and post offices allowed to remain open. Travel within Italy has been banned except for health reasons or urgent matters.
NEW COVID-19 INFECTIONS, MORTALITY & MEDIA COVERAGE TREND // GERMANY

LOW MORTALITY AND DECREASING INFECTIONS LET MEDIA COVERAGE DECLINE SIGNIFICANTLY

- Even though COVID-19 related deaths increased again over last week, the absolute figure is relatively low
- Europe’s most dramatic reduction in COVID-19 news
- Advice: relatively low mortality and declining new infections suggest that Phase III is beginning. Act now

**Social Distancing**

Unlike other European countries, Germany has so far stopped short of ordering its over 80 million population to remain at home — instead opting for strict social distancing measures which were issued on March 22.

**COVID-19 Scorecard**

<table>
<thead>
<tr>
<th>Country</th>
<th>Infection Rate</th>
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<tbody>
<tr>
<td>Spain</td>
<td>0.25%</td>
</tr>
<tr>
<td>US</td>
<td>0.19%</td>
</tr>
<tr>
<td>France</td>
<td>0.17%</td>
</tr>
<tr>
<td>UK</td>
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</tr>
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<td>Italy</td>
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</tr>
<tr>
<td>Germany</td>
<td>0.10%</td>
</tr>
<tr>
<td>China</td>
<td>&lt;0.01%</td>
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**COVID-19 Infect. Rate**

- Spain: 0.25%
- US: 0.19%
- France: 0.17%
- UK: 0.15%
- Italy: 0.13%
- Germany: 0.10%
- China: <0.01%

**Social Distancing**

Unlike other European countries, Germany has so far stopped short of ordering its over 80 million population to remain at home — instead opting for strict social distancing measures which were issued on March 22.
NEW INFECTION AND DEATH RATES SEEM UNDER CONTROL. LOCKDOWN RESTRICTIONS HAVE BEEN RELAXED
MEDIA ACCELERATING OPENNESS TO NEW TOPICS
ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS. BUT INDICATIONS SUGGEST PHASE III HAS BEGUN. ACT NOW.

The Spanish government declared a state of emergency on March 14, issuing a general confinement order for more than 46 million people.

STATE EMERGENCY

PHASE I DETECTION

PHASE II PREVENTION

PHASE III CONTAINMENT

RESTRICTIONS IN PLACE UNTIL APRIL 11
EASED RESTRICTIONS

COVID-19 INFECT. RATE

SPAIN 0.25%
US 0.19%
FRANCE 0.17%
UK 0.15%
ITALY 0.13%
GERMANY 0.10%
CHINA <0.01%

DATA
TRACKED COVID-19 INFECTIONS (JOHNS HOPKINS UNIVERSITY)
MEDIA VISIBILITY (GROSS REACH)
TRADITIONAL & SOCIAL

LEGEND
NEW COVID-19 MEDIA COVERAGE
NEW COVID-19 INFECTIONS
NEW COVID-19 DEATHS

…IN RESPECTIVE WEEK

MARKETS
SPAIN

UNIVERSE
ALL COVID-19 NEW TRACKED INFECTIONS
ALL COVID-19 RELATED MEDIA COVERAGE

PERIOD
FROM: FEB 10TH, 2020
TO: APRIL 19TH, 2020

PAGE 19
COVID-19 RELATED DEATHS SLIGHTLY DECREASE IN CW 16

MEDIA CONTINUE TO DEMONSTRATE INCREASED OPENNESS TO NON-COVID NEWS

ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS. BUT INDICATIONS SUGGEST PHASE III HAS BEGUN. ACT NOW.

The French government announced a strict nationwide lockdown on March 17, banning all public gatherings and telling residents to stay inside except for grocery shopping and other essential tasks. Along with closing all non-essential shops, open-air markets have been ordered to shut. People in France are also required to fill out a form stating their reason for leaving the house.

RESTRICTIONS IN PLACE UNTIL MAY 11
NEW COVID-19 INFECTIONS, MORTALITY & MEDIA COVERAGE TREND // UK

UK SEEM TO GET IT UNDER CONTROL: STABLE NEW INFECTIONS AND MORTALITY

- QUEEN SPEECH AND INFECTION OF PRIME MINISTER BORIS JOHNSON LEAD TO A MEDIA COVERAGE PEAK IN CW14 & CW15 – AND A HUGE DROP THE WEEK AFTER
- STAND BY FOR MORE FAVORABLE INFECTION AND MORTALITY TRENDS

LOCKDOWN
The British government ordered a lockdown on March 23, limiting people to trips outside the home solely for grocery shopping, medical needs and traveling to work if working from home is not an option. Social gatherings and meeting up in crowds have been banned. One form of solitary exercise is permitted such as running or riding a bicycle. Police will be enforcing the lockdown measures, but people are not required to bring papers with them when they go outside to justify their reason for leaving the house.

RESTRICTIONS IN PLACE WITH NO END-DATE, PROBABLY MAY 25

COVID-19 SCORECARD

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MEDIA VISIBILITY (GROSS REACH)
TRADITIONAL & SOCIAL

LEGEND
○ NEW COVID-19 MEDIA COVERAGE
○ NEW COVID-19 INFECTIONS
○ NEW COVID-19 DEATHS
...IN RESPECTIVE WEEK