WHEREAS:

• Certain countries around the world are ahead of others in terms of their epidemic stage as currently reported by both the media and healthcare experts.
• Certain countries have “flattened the curve” of the pandemic’s growth and mortality rates while others 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

**MARKETS**

- USA
- EU G5
- CHINA

**MEDIA SCOPE**

- 50,000+
- Traditional print, online, TV, radio & podcast media.
- + main social channels: WeChat, Weibo, Twitter, Facebook, Instagram & LinkedIn

**METRICS / EARNED MEDIA VISIBILITY**

- Media visibility = gross reach
- Potential number of individuals exposed to an earned media message in aggregate over time

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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)**

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**IMAGE:**

- Map of the world highlighting COVID-19 cases in USA, EU G5, and China.
- Social media icons: WeChat, Weibo, Twitter, Facebook, Instagram, LinkedIn.
- Graphic overlay showing global COVID-19 cases and trends.
I. EXECUTIVE SUMMARY: INSIGHTS AND GUIDANCE
1. **USA:** COVID-19 NEWS AND PRESIDENT TRUMP CONTINUE TO DOMINATE NEWS COVERAGE (UP 3% TO 92% OVER LAST WEEK). THIS LEAVES PROFESSIONAL COMMUNICATORS WITH VERY LIMITED OPPORTUNITIES TO BREAK THROUGH. PANDEMIC-RELATED TOPICS REMAIN IMPORTANT IF THEY ARE CREDIBLE (CLEARLY, THE MEDIA CONSIDERS THEM COMPELLING). OPENINGS AROUND THE COUNTRY REMAIN CONTROVERSIAL AND DO NOT SIGNAL A “RETURN TO NORMAL.” DOW JONES INDUSTRIALS AVERAGE TAPERS AS EARNINGS ARE ANNOUNCED.

2. **CHINA,** **GERMANY,** **ITALY** AND **FRANCE** ALL EXHIBIT FAVORABLE ENVIRONMENTS FOR PROACTIVE PUBLIC RELATIONS WITH INFECTION RATES, MORTALITY AND MEDIA TRENDS POINTING TOWARDS A MORE RECEPTIVE ENVIRONMENT.

   - **THE UK AND SPAIN APPEAR TO BE HEADED TOWARDS INCREASED MORTALITY RATES:**
     - **SPAIN,** WHILE RELATIVELY LOW IN VOLUME, INDICATES A MODEST INCREASE IN THE WEEKS TO COME
     - **UK,** WHILE RELATIVELY HIGH, INDICATES WORSENING INFECTION AND MORTALITY RATES. MEDIA SEEMS MORE FAVORABLE THAN IT ACTUALLY IS DUE TO THE PEAK OF PANDEMIC COVERAGE WITH THE QUEEN AND PM IN THE NEWS A FEW WEEKS AGO.

3. **FOR THE PAST FEW WEEKS,** THE CONCURRENCE OF A RISING STOCK MARKET COINCIDED WITH IMPROVED MEDIA ENVIRONMENT. NOW, WITH MAJOR EARNINGS NEWS – MUCH OF WHICH IS NEGATIVE – THE MARKETS ARE DECLINING WHILE THE MEDIA MOVE ON TO OTHER AREAS OF INTEREST.
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.

### COVID-19 Scorecard

<table>
<thead>
<tr>
<th>Country</th>
<th>Infection Rate</th>
<th>New Infections</th>
<th>Mortality</th>
<th>Media Focus</th>
<th>Phase</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Media Focus</td>
<td>IV - Recovery</td>
<td>Proactive Outreach</td>
</tr>
<tr>
<td>Italy</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Media Focus</td>
<td>III - Containment</td>
<td>Start Phase III Communications</td>
</tr>
<tr>
<td>Germany</td>
<td>Moderate</td>
<td>Moderate</td>
<td>Low</td>
<td>Media Focus</td>
<td>III - Containment</td>
<td>Start Phase III Communications</td>
</tr>
<tr>
<td>Spain</td>
<td>Low</td>
<td>Low</td>
<td>Low</td>
<td>Media Focus</td>
<td>III - Containment</td>
<td>Start Phase III Communications</td>
</tr>
<tr>
<td>France</td>
<td>High</td>
<td>Rising</td>
<td>Stable</td>
<td>Rising</td>
<td>II - Prevention</td>
<td>Prepare Now for Phase III to Start</td>
</tr>
<tr>
<td>UK</td>
<td>High</td>
<td>Rising</td>
<td>Stable</td>
<td>Rising</td>
<td>II - Prevention</td>
<td>Prepare Now for Phase III to Start</td>
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<tr>
<td>USA</td>
<td>High</td>
<td>Rising</td>
<td>Stable</td>
<td>Rising</td>
<td>II - Prevention</td>
<td>Prepare Now for Phase III to Start</td>
</tr>
</tbody>
</table>

**Key**

- **Infection Rate**
  - High: Above 0.15%
  - Moderate: <=0.15% >0.1%
  - Low: <0.1%

- **New Infections**
  - Rising: Weekly rising new confirmed COVID-19 cases
  - Stable: Weekly new confirmed COVID-19 cases stable
  - Declining: Weekly new confirmed COVID-19 cases declining

- **Mortality**
  - Rising: Weekly new confirmed COVID-19 related deaths rising
  - Stable: Weekly new confirmed COVID-19 related deaths stable
  - Declining: Weekly new confirmed COVID-19 related deaths declining

- **Media Focus**
  - Rising: All COVID-19 related media coverage rising
  - Stable: All COVID-19 related media coverage stable
  - Declining: All COVID-19 related media coverage declining
## PHASE I: DETECTION

- **Media and Audience**
  - Media and readers in crisis-mode
  - Majority of topics COVID-related

- **Corporate Communications**
  - Corporate citizenship topics appreciated by readers and media
  - Reduce classical corporate topics to minimum
  - Important: use time to create new, digital communications formats for Phase III

- **Management Communications**
  - No changes

- **Product Communications**
  - Important: unless directly relevant to mitigation, "promotional" and product coverage should be moved to Phase III

## PHASE II: PREPARATION & PREVENTION

- **Media and Audience**
  - Increasing allowance for non-corona coverage
  - People still in quarantine with time for news consumption

- **Corporate Communications**
  - Begin to introduce a broader set of corporate stakeholder topics
    - Employees
    - Customers
    - Investors
    - Regulators/legislators

- **Management Communications**
  - Management platforms:
    - Leadership
    - Transparency, reassurance and affirmation
    - Corporate citizenship

- **Product Communications**
  - Run new, digital formats
  - Provide your customers with alternative, new formats
  - Promote digital sales: contactless business will be trending

## PHASE III: CONTAINMENT, MITIGATION & DAMAGE CONTROL

- **Media and Audience**
  - Increasing allowance for non-corona coverage
  - People still in quarantine with time for news consumption

- **Corporate Communications**
  - "Restart / reboot" topics: start of production, sales, etc.
  - Focus on the positive outcomes of the crisis

- **Management Communications**
  - Management platforms:
    - Leadership
    - Transparency, reassurance and affirmation
    - Corporate citizenship

- **Product Communications**
  - Run new, digital formats
  - Provide your customers with alternative, new formats
  - Promote digital sales: contactless business will be trending

## PHASE IV: RECOVERY & REPAIR

- **Media and Audience**
  - Less time for news consumption
  - Back to work

- **Corporate Communications**
  - "Restart / reboot" topics: start of production, sales, etc.
  - Focus on the positive outcomes of the crisis

- **Management Communications**
  - Management platforms:
    - Stronger out of the crisis

- **Product Communications**
  - Important: there is no back to normal for product communications!
    - Brand events and sponsorships limited for next few months due to social distancing
    - Smaller interactions with journalists: emerge: product reviews, test drives, etc.
II. USA TRENDS AND STRATEGIC GUIDANCE
On Tuesday, Trump signed an executive order compelling meat processing facilities to stay open under the Defense Production Act, prompting safety concerns from meat plant workers. Major meat processors such as Tyson Foods were considering closing as many as 80% of their plants due to coronavirus spread among workers, and raised warnings about a pending meat shortage.

In health-related news, a New York Times analysis of newly-released data from the CDC showed that total deaths over a five week period in seven states heaviest hit by the virus were 50% higher than normal death rates, and higher than death rates reported by the virus. In the UK, doctors reported an unusual spike in a rare disease, Kawasaki disease, in children that may be related to coronavirus.

By the numbers
24.8 million articles
357 million social shares

Most Shared Articles Published in Past Week
Looming meat shortage drove social shares this week

Bloomberg: Trump to Order U.S. Meat Plants to Stay Open Amid Pandemic

KTLA: O.C. District Attorney warns residents after release of 7 “high-risk” sex offenders during coronavirus pandemic

COVID-19 coverage continued to lead the media agenda, maintaining a similar share of coverage as in past weeks. Speculations that North Korean leader Kim Jong Un might be dead following an alleged cardiovascular surgery made up 1% of coverage in the past week, though on Saturday May 2 a photograph in North Korean state media showed Kim attending a ribbon cutting ceremony at a fertilizer plant.

Geographic coverage distribution remained similar to previous weeks.
While Government/NGOs and Big Tech* continue to be the most mentioned industries in YTD coverage, their respective share of voice in weekly coverage saw a significant decline last week. Government/NGOs saw a 4% decline week on week, while Big Tech* decreased by 2%. The industries which saw a significant increase, >1%, in share were Retail (+1.4%), Health & Pharmaceutical (+2.4%), and Manufacturing (+1.4%). The increase in these industries was observed the same week as states in the US began to “re-open.”

Government/NGOs and Big Tech* remain the clear leading industries in YTD coverage.
III: INDIVIDUAL COUNTRY TRENDS AND STRATEGIC GUIDANCE
USA, CHINA, ITALY, GERMANY, SPAIN, FRANCE AND UK
NEW COVID-19 INFECTIONS AND MORTALITY CONTINUE TO DECREASE IN THE USA

- **NEW INFECTIONS & MORTALITY IN THE USA DECREASE COMPARED TO PREVIOUS WEEK.**
- **MEDIA COVERAGE SLIGHTLY INCREASES LAST WEEK DUE TO ELON MUSK STATEMENT AND CHINA ACCUSATIONS. THE DOW JONES CONTINUES TO RECOVER**
- **ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS. BUT INDICATIONS SUGGEST PHASE III WILL BEGIN SOON. PREPARE NOW.**

**COVID-19 SCORECARD**

- **COVID-19 INFECT. RATE**
  - US: 0.18%
  - UK: 0.15%
  - SPAIN: 0.11%
  - ITALY: 0.09%
  - FRANCE: 0.05%
  - GERMANY: 0.05%
  - CHINA: <0.01%

- **COVID-19 MEDIA COVERAGE**
  - HIGH
  - MORTALITY
  - MEDIA FOCUS

- **US INDEX: DJIA**

**Lockdowns**
The first US states begin school closings & prepare for lockdowns.

**Phase I** Detection
**Phase II** Prevention
**Phase III** Containment

100% = TOTAL FOR SHOWN TIMEFRAME

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

**Legend**
- NEW COVID-19 INFECTIONS
- NEW COVID-19 DEATHS
- NEW COVID-19 MEDIA COVERAGE
- US INDEX: DJIA

...IN RESPECTIVE WEEK
WATCH OUT: MORTALITY LIKELY TO INCREASE IN UK THIS WEEK

- WATCH OUT: NEW INFECTION SLIGHTLY INCREASED LAST WEEK – MORTALITY IS EXPECTED TO SLIGHTLY INCREASE THIS WEEK AS WELL.
- UK STOCK MARKET REACTED TO THE VIRUS 1-2 WEEKS EARLIER THAN UK MEDIA AND GOVERNMENT.
- ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS AND BEAR IN MIND, THAT MORTALITY MIGHT SLIGHTLY RISE THIS WEEK. BUT INDICATIONS SUGGEST PHASE III WILL BEGIN SOON. PREPARE NOW.

LATE 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.

UK INDEX: FTSE 100

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

PERIOD
FROM: FEB 10TH, 2020
TO: MAY 4TH, 2020

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

LEGEND
- NEW COVID-19 INFECTIONS
- NEW COVID-19 DEATHS
- NEW COVID-19 MEDIA COVERAGE
- UK INDEX: FTSE 100 (UKX)
...IN RESPECTIVE WEEK
NEW COVID-19 INFECTIONS, MORTALITY, MEDIA COVERAGE & FINANCIAL TRENDS // CHINA
LEARN FROM CHINESE COVID-19 COMMS: 7-8 WEEKS AHEAD OF THE WESTERN MARKETS

- 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: PHASE IV COVERAGE HAS STARTED. LEARN FROM CHINA AS THEY ARE 7-8 WEEKS AHEAD.

MARKETS
CHINA

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

PERIOD
FROM: FEB 10TH, 2020
TO: MAY 4TH, 2020

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

LEGEND
○ NEW COVID-19 INFECTIONS
○ COVID-19 DEATHS
○ NEW COVID-19 MEDIA COVERAGE
■ CHINESE INDEX: SHANGHAI COMPOSITE INDEX (SHCOMP)
...IN RESPECTIVE WEEK

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”
ITALY: NEW INFECTIONS AND MORTALITY ARE BOTH FURTHER DECLINING.

MEDIA ARE FURTHER REDUCING FOCUS ON COVID-19 STORIES, ITALIAN ECONOMY IS SLOWLY RECOVERING.

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

ITALY WITH FURTHER DECLINING NEW INFECTIONS AND MORTALITY

PHASE I DETECTION

PHASE II PREVENTION

PHASE III CONTAINMENT

PROJECTION

COVID-19 INFECT. RATE

US

UK

SPAIN

ITALY

FRANCE

GERMANY

CHINA

<0.01%

0.05%

0.05%

0.11%

0.09%

0.15%

0.18%

COVID-19 SCORECARD

INFECTION RATE

NEW INFECTIONS

LOW

MORTALITY

MEDIA FOCUS

ITALIAN INDEX: FTSE MIB (I945)

LOCKDOWN

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 & FINANCIAL TREND // GERMANY
GERMANY HAS ENTERED THE CONTAINMENT-PHASE

- GERMANY: HAS ENTERED PHASE III AND IS CONTAINING THE VIRUS.
- ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS, BUT START-OFF WITH PHASE III, NON-COVID-19 RELATED TOPICS. 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.
NEW INFECTIONS AND MORTALITY FURTHER DECREASE.
MEDIA COVERAGE CONTINUES TO DECREASE AFTER ANNOUNCEMENT OF LOCKDOWN MEASURES, WHEREAS FRENCH ECONOMY STARTS TO SLOWLY RECOVER.
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.

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**COVID-19 INFECTION RATE**

US 0.18%
UK 0.15%
SPAIN 0.11%
ITALY 0.09%
FRANCE 0.05%
GERMANY 0.05%
CHINA <0.01%

**COVID-19 SCORECARD**

- **INFECTION RATE**
- **NEW INFECTIONS**
- **COVID-19 DEATHS**
- **NEW COVID-19 INFECTS**
- **FRENCH INDEX: CAC 40**
- **COVID-19 MEDIA COVERAGE**
- **FRENCH INDEX: CAC 40 (PX1)**

...IN RESPECTIVE WEEK
WATCH OUT: NEW INFECTION SLIGHTLY INCREASED LAST WEEK – MORTALITY IS EXPECTED TO SLIGHTLY INCREASE THIS WEEK AS WELL.

MEDIA ACCELERATING OPENNESS TO NEW TOPICS.

ADVICE: ACT SENSIBLY IN YOUR COMMUNICATIONS AND BEAR IN MIND, THAT MORTALITY MIGHT SLIGHTLY RISE THIS WEEK. BUT INDICATIONS SUGGEST PHASE III HAS BEGUN. ACT NOW.