



FLEISHMAN
HILLARD

TRUE GLOBAL
INTELLIGENCE

COVID-19 MINDSET: THE COLLISION OF ISSUES

WAVE 2: GLOBAL REPORT

July 2020

“Not everything that is faced can be changed, but nothing can be changed until it is faced.” — James Baldwin

We continue to face extraordinary uncertainty.

In this research we attempt to chart a path forward by asking difficult questions that show a new reality for companies, their narratives, their workspaces and how they are deeply interconnected with societal issues.

We must understand what we expect of institutions, each other and how this crisis is reshaping our perceptions, behaviors, values and societies before we can move forward.

- Natasha Kennedy
TRUE Global Intelligence
Global Managing Director

THE PURPOSE OF THIS REPORT IS TO PROVIDE INSIGHTS INTO THE COLLISION OF ISSUES FACING POPULATIONS, COUNTRIES AND COMPANIES. THE ENDURING PRESENCE OF COVID-19 AND DISCRIMINATION NEEDS TO BE UNWRAPPED SO THAT WE CAN UNDERSTAND WHAT IT WILL TAKE TO **CREATE SAFETY FOR ALL.**

Safe

adjective

*secure from liability to harm, injury, danger, or risk: a safe place.
free from hurt, injury, danger, or risk: to arrive safe and sound.
involving little or no risk of mishap, error, etc.: a safe estimate.*



IN THIS RESEARCH WE SOUGHT TO UNDERSTAND:

- *What issues are most important to consumers and which do they expect companies to take a stand on*
- *How committed are institutions to doing the right thing*
- *Expectations for business and government*
- *How various organizations are responding to the pandemic and how important the response is*
- *Expectations and perceptions of safety in public and work places*
- *How people are evaluating the future and what behaviors can we expect in the next 6 to 12 months*

METHODOLOGY

TRUE Global Intelligence,

the in-house research practice of FleishmanHillard, fielded an online survey of adults 18 and older in the following markets from June 8 – 19, 2020. Data have been weighted by gender and age in all markets as well as region in the United States, Canada and China.

In the US an oversample of n=200 African Americans, n= 200 Hispanic and n=100 LGB was added.

The data has been weighted by gender and age in all markets as well as by Census region in the United States, China and Canada.

	Gen Pop	Sample Size	Margin of Error
Total		n=8,817	±1.2%
US		n = 1,276	±2.9%
UK		n = 1,277	±2.9%
China		n = 1,280	±3.0%
South Korea		n = 1,227	±3.0%
Italy		n = 1,275	±3.0%
Germany		n = 1,242	±2.9%
Canada		n = 1,240	±3.0%

INSIGHTS

The collision of global issues has elevated systemic racism, discrimination and violence against women. *Companies have an obligation to demonstrate real action and advocacy because their employees and their customers have higher expectations than ever.*

All aspects of the world have changed *where public health and safety has become a priority over personal needs. This reality is now igniting future health and financial challenges and burdens for countries and consumers to face.*

The pandemic has shifted consumers' outlook significantly, *and many believe their lives might be even more challenging six months from now. Compared to April, consumers see the world as even riskier.*

INSIGHTS

Consumers believe the path to recovery is a long one. *Consumers are looking for acknowledgement of their challenges rather than overly optimistic promises of an undefined future.*

The end of the pandemic is more complicated than a single solution. *A vaccine may not necessarily be the singular solution so many expect it to be.*

Safety is work in progress *in the medical community- the one true north that we rely on for direction. This uncertainty makes “being safe” as a final destination both unattainable and unrealistic.*

BY THE NUMBERS

An Overview

The enduring nature of the pandemic has become the new normal with no single solution- such as a vaccine- that will make all consumers feel that the threat to them personally is gone.

The pandemic has quickly uncovered health disparities, stigmas and discrimination where some lives are saved while others are ignored. This falls on the backdrop of global systemic racism, discrimination and violence against women.

The needs of the world populations are real- with consumers challenged financially.

Despite this aching of humanity, many believe governments and companies are opening too quickly, while, one out of five individuals still will not wear a mask to protect others unless it is either government mandated or not at all.

The collision of issues and societal disparities

BY THE NUMBERS

72%

Say discrimination, equality and racism is the most important issue and 59% expect companies to take a stand on it

70%

Believe the pandemic has revealed significant healthcare inequities based on ethnicity, income and age

64%

Say that people with underlying health conditions are now more stigmatized due to the pandemic

71%

Fear that restrictions are being lifted too quickly and may cause an increase in the infection rate

43%

In this health crisis, I feel more discrimination than before when seeking medical treatment

62%

Believe that antibody testing will create a "two-tier" society- those that are protected and those that are vulnerable

30%

Expect their overall quality of life will worsen in the next six months

34%

Expect their financial situation will worsen in the next six months

70%

Do not have enough or have just enough money to pay monthly expenses

80% (+7% since April)

Say the pandemic has changed how they see the world

60%

Believe a vaccine will mark the end of COVID-19

19%

Will only wear a mask because it is legally required or will not wear a mask even if it is required



THE IMPACT OF SOCIETAL ISSUES ON CORPORATE EXPECTATIONS AND BEHAVIORS

THE COLLISION OF GLOBAL ISSUES REQUIRES AUTHENTIC ACTION BY INSTITUTIONS

While COVID-19 will have a significant and lasting impact on almost every area of our lives, the world also is addressing the issues of systemic racism, discrimination and violence against women. Corporations have an obligation to demonstrate real action and advocacy because their employees and their customers have higher expectations than ever, recognizing that social justice work extends beyond the workplace.

Consumers and employees are going to demand of company leaders that they use the pandemic to re-think more than just financial expectations and immediate challenges like return to the workplace – there is going to need to be a new, values-led conversation between brands and consumers, as well as, employers and employees moving forward.

THE ISSUES MOST IMPORTANT TO CONSUMERS ARE INTER-CONNECTED BY SYSTEMIC DISCRIMINATION AND INEQUITIES

BRANDS ARE EXPECTED TO TAKE A STAND

Public health has risen to the top 3 issues displacing protecting the environment/climate.

Q: How important are each of the following issues to you?

O: For which of the following issues, if any, do you expect companies that you use products and services from to take a stand on?

Issues rated as “Very important”	Global Total	Issues you expect companies to take a stand on Global Total
<i>Discrimination and equality/racism</i>	72%	59%
<i>Access to affordable, quality healthcare</i>	69%	29%
<i>Public health risks (preventing/controlling new diseases)</i>	65%	36%
<i>Violence against women</i>	63%	32%
<i>Data privacy and security</i>	62%	50%
<i>[US ONLY] Gun control [UK ONLY] Knife Crime [Italy, Germany, China, South Korea & Canada ONLY] Crime</i>	60%	23%
<i>Protecting the environment/climate change</i>	58%	48%
<i>Access to affordable, quality education</i>	57%	24%
<i>Poverty</i>	55%	28%
<i>Unemployment</i>	53%	33%

VIOLENCE AGAINST WOMEN IS CONSIDERED “THE COVID-19 SHADOW PANDEMIC”. THE UNITED NATIONS BELIEVES THAT EMPLOYERS HAVE A “DUTY OF CARE” TO EMPLOYEES AFFECTED BY DOMESTIC VIOLENCE

63%

*Say violence against women is very important to them today – Women globally (71%) and all consumers in Italy (81%) say that violence against women is their **most important** issue*

32%

Expect companies to take a stand on violence against women



The COVID-19 shadow pandemic: Domestic violence in the world of work: A call to action for the private sector

The unprecedented increase in domestic violence since the onset of the [COVID-19 pandemic](#) marks an urgent call to action for the private sector to leverage their existing resources and influence to keep women safe at home and safe at work.

Employers have a “duty of care” to their employees working remotely from home and are in a good position to support those who may be affected by domestic violence. Many employers recognize their role and have been doing their part prior to and during COVID-19, and the importance of creating a safe and supportive working environment for survivors of domestic violence. An important element of this, reflected in the [Women’s Empowerment Principles \(WEPs\)](#) framework, is the broader promotion of gender equality and women’s empowerment in the world of work.



HOW ARE INSTITUTIONS PERFORMING- COVID VS DOING RIGHT

Institutions are responding to the pandemic, but that's not enough on its own to be perceived as being committed to doing the right thing.

Q: Please rate how well are each of the following institutions are doing in their role in responding to the Coronavirus/COVID-19.

Q: How committed do you believe each of the following institutions are to doing the right thing?

% rating institution's performance "excellent," "great" or "good"

Showing Global Totals for both waves of data

	Wave 2 (July)	Wave 1 (April)	Global Total
<i>Local businesses</i>	77%	74%	34%
<i>Pharmaceutical companies</i>	75%	72%	38%
<i>Local schools</i>	75%	75%	39%
<i>Retailers</i>	74%	75%	30%
<i>Local/city government</i>	74%	74%	36%
<i>State/provincial government</i>	72%	75%	36%
<i>Individuals</i>	71%	70%	27%
<i>National government</i>	69%	74%	40%
<i>Employers</i>	69%	66%	27%
<i>Major corporations</i>	67%	63%	26%
<i>The Media</i>	61%	65%	25%

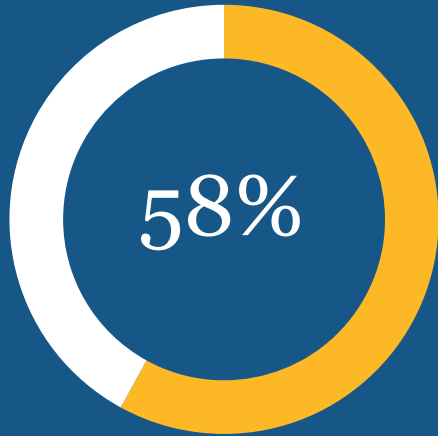
How committed is each to doing the right thing?

Showing % ranking each institution 8-10 on a 10-pt scale

91%

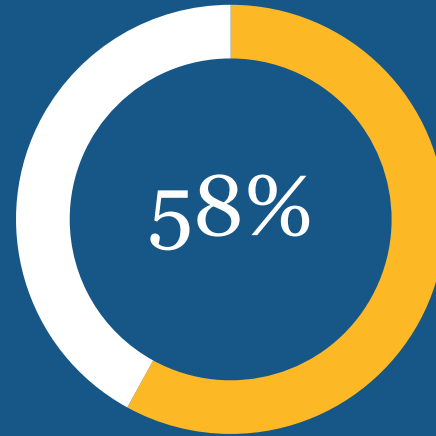
say it is important for companies to show that they are committed to doing the right thing

SHARED RESPONSIBILITY, SACRIFICE, INNOVATION AND VALUES IS THE EXPECTED PATH FOR COMPANIES TO TAKE TO SOLVE FOR SOCIETAL ISSUES



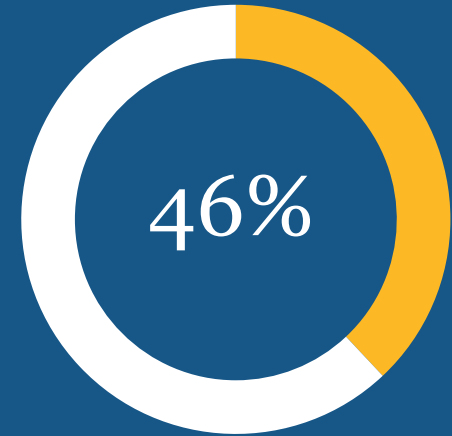
Shared responsibility and sacrifice

Where companies share the burden of an issue with employees and customers so that no one group suffers more than the other



Shared innovation and collaboration

Where companies work with each other and governments to keep people safe and help all people prosper



Shared values

Where companies restate their missions to align with the collective good of the communities and customers that they serve

Q. Which of the following are important actions companies should take to solve for societal issues?

**NOW MORE THAN
EVER, CEOS MUST
SPEAK OUT AND ACT
ON ISSUES AFFECTING
THEIR CUSTOMERS,
EMPLOYEES AND THE
COMMUNITIES WHERE
THEY DO BUSINESS**

**AND IT SHOULD BE
DONE WITH
COMPASSION AND
EMPATHY**

51%

*Take a stand on health and safety measures
that the company is taking for their
employees and customers*

42%

*Show how the company's values support the
values of their communities, customers and
employees.*

36%

*Show how their company is partnering with
other organizations to find solutions to solve for
societal issues*

44%

*Take a stand on issues related to data
privacy and security*

41%

*Show empathy and compassion for their
communities, customers and employees in
their words and actions.*

36%

*Take a stand on issues related to
climate change*

Q. Which of the following is important for CEOs to do publicly?



THE IMPACT OF COVID-19

THE PANDEMIC'S REACH HAS BEEN PERVASIVE, AND MANY EXPECT IT WILL EXTEND FOR MONTHS

The pandemic has shifted consumers' outlook significantly, and many believe their lives might be even more challenging six months from now than they already are.

Re-entering the world is a priority, but the ways that people will interact with the world around them is likely to change and priorities will continue to evolve.

GLOBALLY, CONSUMERS HAVE NEARLY DOUBLED THEIR EXPECTATION FOR WHEN LIFE WILL GET BACK TO NORMAL

The outlook has only gotten
 more grim as consumers
 better understand the road to
 recovery will not be linear

| 29 weeks |

Until a widespread return to
 “normal” - nearly twice the
 expectation from our first
 study in April (17 weeks)

| 50% |

Predict it will take anywhere
 from five months to more than a
 year

HOW LONG, IN WEEKS, DO YOU THINK IT WILL BE BEFORE LIFE GETS BACK TO 'NORMAL'?

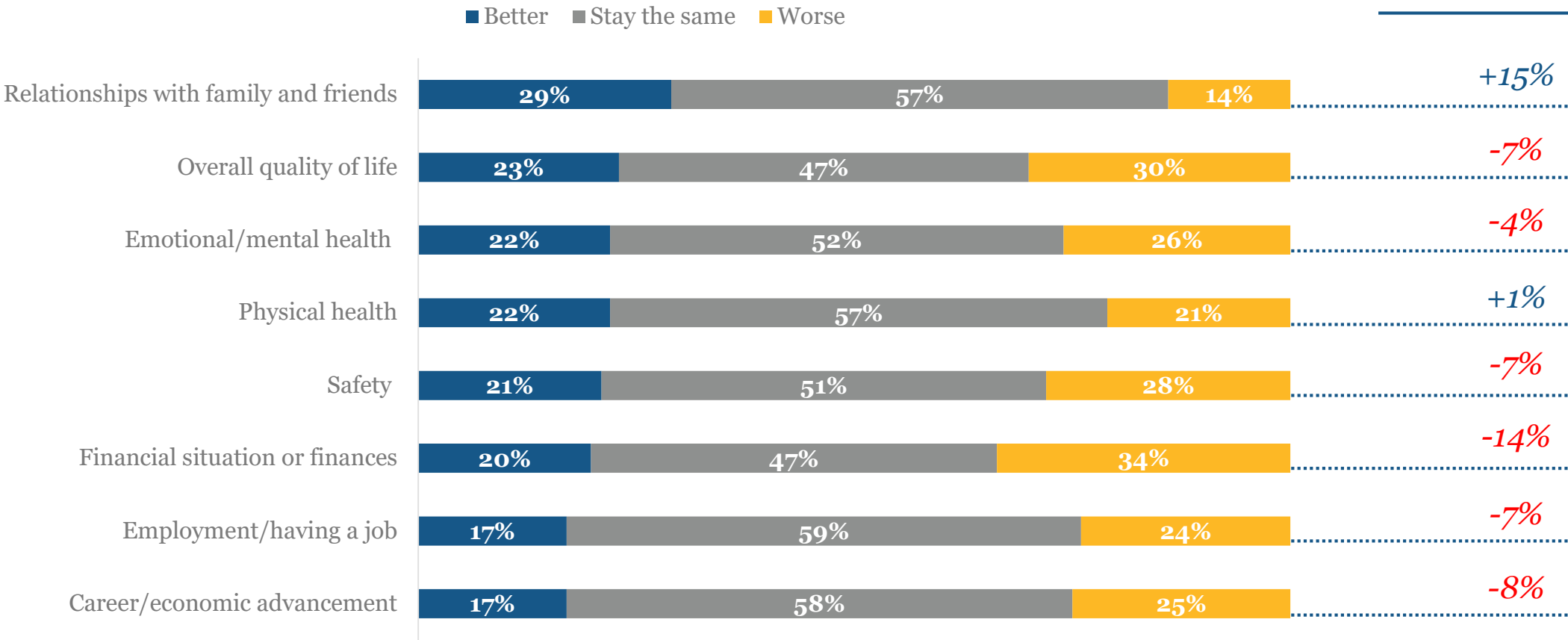
	Global Total	U.S.	UK	China	S. Korea	Italy	Germany	Canada
Average (weeks)	29	29	34	13	32	28	33	35
Between five months & more than one year	50%	48%	58%	18%	59%	49%	57%	61%

Q: How long, in weeks, do you think it will be before life gets back to "normal"?

THE PANDEMIC WILL CONTINUE TO TOUCH ALL ASPECTS OF CONSUMERS' LIVES

Will each of the following get better, worse or stay the same over the next six months?

*Net Positive Outlook
(Positive – Negative)*



Q: Do you feel that each of the following will get better, worse, or stay the same over the next 6 months?

CONSUMERS ARE BRACING FOR LASTING IMPACT, AND DON'T EXPECT TO FORGET THE COVID-19 PANDEMIC

| 46% |

Will postpone routine doctor's visits or elective procedures

| 70% |

Do not have enough or have just enough money to pay monthly expenses

54% say they've stopped or cut back on expenses

| 64% |

Stopped purchasing non-essential items and will continue to do so post-pandemic.

CONSUMERS BELIEVE THE PATH TO RECOVERY IS A LONG ONE

The pandemic has continued much longer than many anticipated, and consumers are increasingly aware that the road to recovery will be challenging.

Along the way, consumers are looking for acknowledgement of their challenges rather than overly optimistic promises of an undefined future.

The COVID-19 pandemic has altered our perceptions of what's safe and what's not and will significantly impact how and if we live in public over the next 6 to 12 months.

**PEOPLE ARE SEARCHING
FOR HOPE, AND ARE
UNCERTAIN ABOUT THE
IMMEDIATE FUTURE**

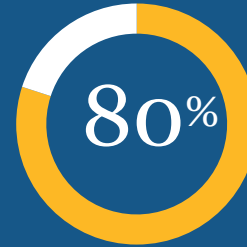
**MANY FEEL THAT THEY
DO NOT HAVE CONTROL
OVER GOVERNMENT
ACTIONS**

71%

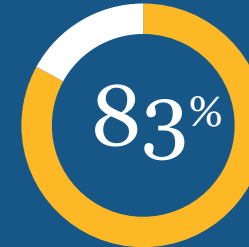
*are afraid that restrictions in my
community are being lifted too quickly
for economic reasons and there will be
an increase in the infection rate*

*Q: For each of the following, please indicate whether
you agree or disagree with the following statements.*

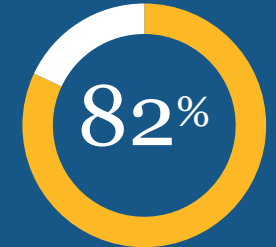
*The Coronavirus/COVID-19 pandemic
has changed our view of the world...*



*Say the pandemic
has changed their
view of the world*

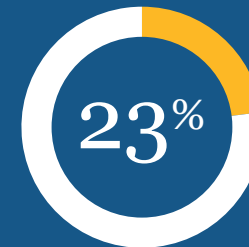


*There is too much
uncertainty about
when it will be safe to
be in public spaces*

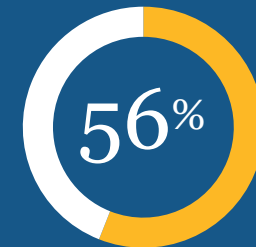


*The world now seems
like a riskier place*

...and changed our outlook about our own lives



*Say their overall quality of life will
be better in 6 months than today*



*See the people around them as
more dangerous than before*

PRIORITIES ARE SHIFTING AS CONSUMERS ADAPT FOR WHAT'S TO COME

Consumers are facing the pandemic's challenges by adapting their priorities to focus on essential purchases and actions with the knowledge that the "new normal" may follow a profound transitional period.

FINANCIAL IMPACT

54%

Will stop or cut back on spending/expenses over the next 6-12 months

52%

Will be more committed to financial planning over the next 6-12 months in case of another crisis

HEALTHCARE BELIEFS

67%

Would share personal data with companies to help control the outbreak

70%

Would support people being tested for antibodies and having a digital immunity passport to show my "immunity" status

PURCHASE PRIORITIES

63%

Will look into a company's behavior during COVID-19 before purchasing their product

62%

Say the products and services they once thought were important have changed

SOCIAL ACTIVITIES

81%

Plan to attend a gathering with friends/family in the next 6-12 months

55%

Expect to go to the office in the next 6-12 months

ALL ASPECTS OF THE WORLD HAVE CHANGED WHERE PUBLIC HEALTH HAS BECOME A PRIORITY OVER PERSONAL HEALTH AND NEEDS

A question most frequently on the minds of our clients is will behavior change be permanent? Some behavior changes if made permanent may create new public health challenges and some may be opportunities.

The most concerning behavioral change is the canceling or postponing of health appointments or procedures that can lead to missed early diagnosis and treatments. In addition, consumers are now living their lives in financial uncertainty and insecurity.

| 16% |

I do not have enough money to pay for all of my monthly expenses.

| 54% |

I have just enough money to pay for all of my monthly expenses

| 31% |

I have more than enough money to pay for all of my monthly expenses

CONSUMERS MAY NEED TO RECALIBRATE WHAT FINANCIAL HEALTH MEANS

Most consumers are financially insecure and many anticipate a decrease in their income.

Expected behaviors over the next 12 months

Global Total

<i>Stop or cut back on spending/expenses</i>	54%
<i>Save more money than I normally do</i>	54%
<i>More seriously plan for and make major life decisions</i>	52%
<i>Be more committed to planning financially in case there is another crisis such as a pandemic</i>	52%
<i>Delay big purchases (e.g. car, home, vacations, etc.)</i>	44%
<i>Use my credits cards less</i>	44%
<i>Spend my money on experiences rather than products</i>	40%
<i>Use savings to pay for monthly expenses</i>	40%
<i>Have a significant decrease in income</i>	40%
<i>Provide financial support for a family member</i>	38%
<i>Stop or contribute less to my savings</i>	37%
<i>Donate more money to causes that are important to me</i>	37%

Q. Which of the following do you anticipate doing in the next 12 months?

POSTPONING HEALTHCARE MAY RESULT IN INCREASES IN UNDIAGNOSED ILLNESSES THAT WILL HAVE PROGRESSED

Nearly half of consumers will postpone routine doctor's visits or elective procedures. Telehealth is quickly gaining adoption.

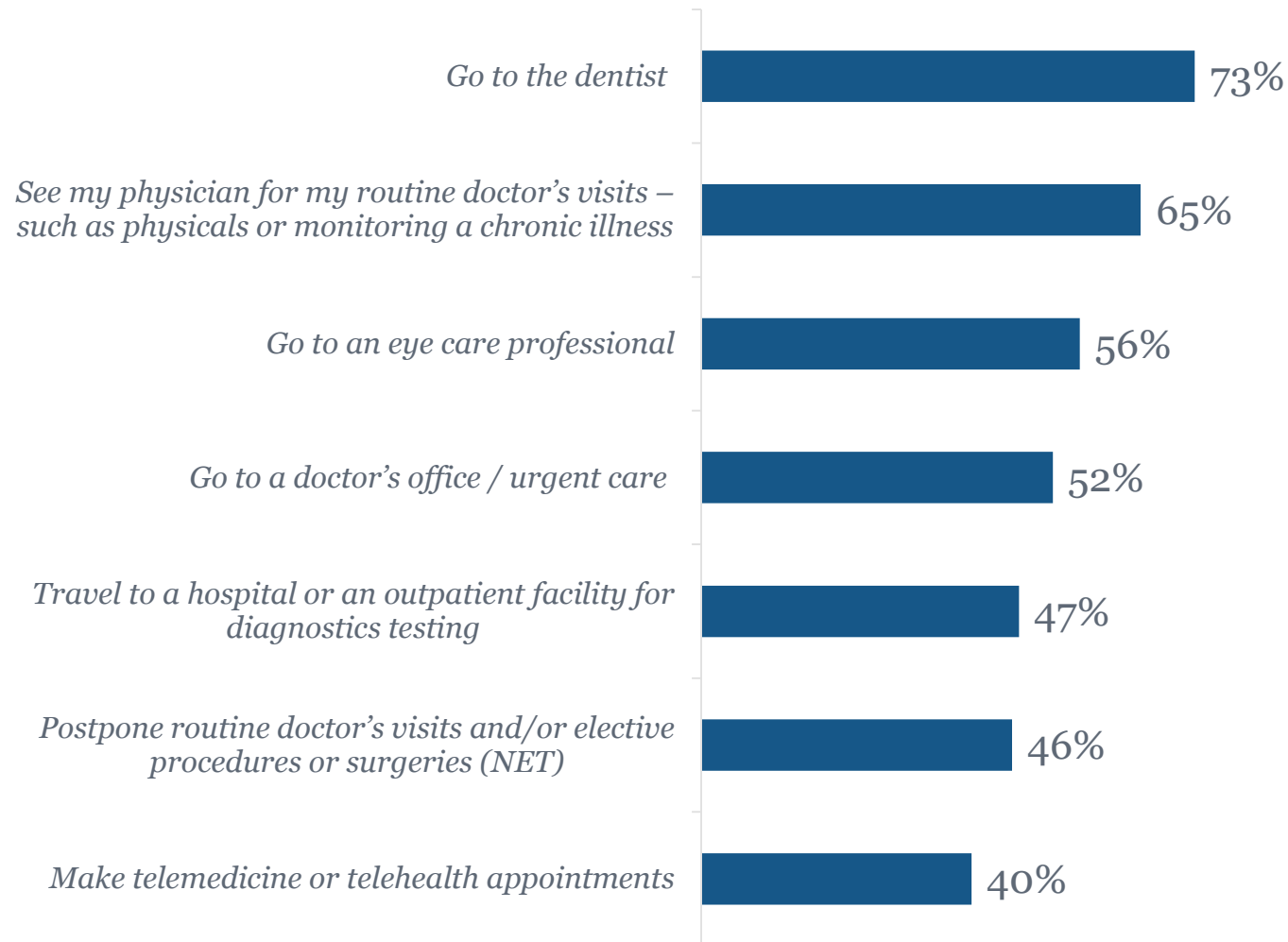
61%

Say it can wait until the pandemic is over

38%

Do not feel it would be safe

Expected actions over the next 12 months



Q. Which of the following do you anticipate doing in the next 12 months?

IN THE NEXT 12 MONTHS CONSUMERS WILL CONTINUE TO SEEK THE COMFORT AND SUPPORT OF FAMILY AND FRIENDS

Consumers will seek the outdoors locally but are split in terms of who will be venturing into indoor public places and what those venues are.

Q. Which of the following do you anticipate doing in the next 12 months?

Expected behaviors over the next 12 months

Global Total

<i>Go to gatherings with friends and family</i>	81%
<i>Going to public outdoor spaces like parks, playgrounds, pools, etc.</i>	75%
<i>Go on a domestic vacation</i>	69%
<i>Take public transportation (e.g., subway, buses, trains)</i>	63%
<i>Go to the movies</i>	61%
<i>Stay in a hotel</i>	61%
<i>Go to the office</i>	55%
<i>Travel on an airplane</i>	50%
<i>Travel on a train</i>	49%
<i>Attend the theatre</i>	48%
<i>Go on an international vacation</i>	45%
<i>Go to a gym/workout class</i>	45%
<i>Attend concerts</i>	44%
<i>Attend sporting events</i>	42%
<i>Go to church</i>	40%
<i>Go to school</i>	33%
<i>Take a car sharing service (Uber, Lyft, Via)</i>	33%
<i>Place my child/children in daycare</i>	28%
<i>Go on a cruise</i>	25%

WHILE CONSUMERS ANTICIPATE EXTENDING THEIR SHOPPING ACTIVITIES, THERE IS AN EMERGING DESIRE FOR PRODUCTS MADE LOCALLY

Brands relationships and purchases will be driven by how these brands respond to societal issues.

Q. Which of the following do you anticipate doing in the next 12 months?

Q. Please rate your agreement with the following statements

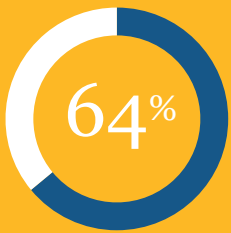
Expected behaviors over the next 12 months

Global Total

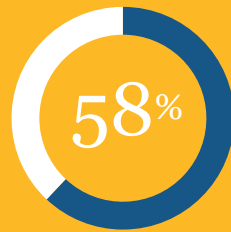
Go food/grocery shopping	90%
Visit large retail stores	78%
Eat at a sit-down restaurant	78%
Go shopping at indoor malls	76%
Go into a store to try on clothing/shoes	72%
Buy more things online for home delivery	70%
Eat at fast-food/quick service outlets	66%
Spend more time browsing / researching online before visiting stores or restaurants	66%
Visit bars / pubs	59%
Make more use of self-service check-outs or curbside pickup	58%



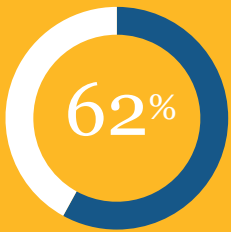
believe having the capability to manufacture products in my own country will make my country stronger and more resilient in the next global crisis



have ceased purchasing non-essential items and will continue to do so post the Coronavirus/COVID-19



have a deeper relationship with brands based on how they behaved during the Coronavirus/COVID-19



will look into how a company behaves when responding to issues of racial or gender inequality when considering whether to buy their product

THE END OF THE PANDEMIC IS MORE COMPLICATED THAN A SINGLE SOLUTION

A vaccine may not necessarily be the singular solution so many expect it to be, having its own challenges prior to the pandemic.

The world has changed and it's going to take a great deal of reassurance to convince us that the very places we used to view as places to get well and be happy are safe enough to set foot in again.

How will we know when it is safe? Who will we trust to tell us? What signs and signals will we be looking for to reassure us that necessary precautions for our safety have been put in place?

WHAT DO CONSUMERS WANT FOR TODAY AND HOW WILL THIS END TOMORROW

There is no absolute fix or solution to feeling safe. Even vaccines are not a panacea having their own controversies pre-COVID.

O. Please rate your agreement with the following statements.

ACTIONS PEOPLE ARE EXPECTING TODAY?

90%

Say it is important for countries to develop their own capacity to manufacture products

89%

Believe that essential workers must be compensated in a way that reflects their value to society

78%

Believe that working from home creates opportunities to hire more diverse populations where travel to work has been a barrier

WHAT WILL END THE THREAT?

60%

A vaccine against the virus

42%

Zero infections in your community

38%

Medications that can significantly lessen symptoms

60%

say a vaccine against the virus will mark the end of the COVID-19 threat, only a slim majority.

The end of the pandemic is not as clear-cut in consumers' minds as one might think. A vaccine may quell the threat for many, but our results suggest that there may not be a universal solution for every consumer.

ASIDE FROM A CLEAR SIGNAL THAT ENDS THE COVID-19 THREAT, THERE IS NO CONSENSUS FOR WHO SHOULD DELIVER THAT MESSAGE

Trust has been challenged and eroded over the course of the pandemic. Delivering decisive and trustworthy information to the public is just as much a public health challenge as developing a solution.

	Global Total	U.S.	UK	China	S. Korea	Italy	Germany	Canada
<i>“Who do you want to hear from regarding new testing and safety measures for COVID-19?”</i>								
<i>Public health officials and scientists</i>	51%	50%	58%	53%	46%	45%	35%	66%
<i>Leading infectious disease experts</i>	46%	45%	44%	57%	32%	44%	47%	54%
<i>Your doctors</i>	42%	46%	45%	25%	18%	53%	56%	48%
<i>The World Health Organization (WHO)</i>	41%	36%	47%	49%	26%	43%	38%	48%
<i>Government officials</i>	39%	31%	52%	39%	48%	27%	19%	54%
<i>Hospitals</i>	38%	37%	47%	34%	25%	49%	30%	42%
<i>Pharmaceutical/healthcare companies</i>	24%	22%	30%	29%	18%	22%	18%	27%
<i>The media</i>	24%	17%	16%	13%	40%	17%	38%	24%
<i>Employers/Companies</i>	15%	16%	19%	14%	5%	15%	17%	20%
<i>Social media</i>	14%	13%	9%	25%	17%	11%	15%	12%

Q: Who do you want to hear from regarding new testing and safety/preventative measures for COVID-19?

WHAT DOES SAFETY LOOK LIKE

Safety is work in progress in the medical community- the one true north that we rely on for direction. As a result, there is uncertainty and a lack of consensus as to what safety looks and feels like.

This clarity into uncertainty makes “being safe” as a final destination both unattainable and unrealistic.

We cannot be completely safe but we can do things that make us safer.

BEING SAFER CONSISTS OF CLEAR SIGNALS AND SYSTEMS- RANGING FROM HIGH TECH TO NO TECH

*People will adapt if it
is easy and free*

44%

Automated deep
cleaning of indoor
public spaces

35%

Working from home as the
new normal with office
buildings that are used
only as needed for meeting
spaces

28%

Public information rating a
company's approach to
providing employees and
customers with safe
working

42%

Touchless payment
methods

34%

At-home and in-office
test kits for viral and
bacterial infections

21%

Monitor a customer or
employee's health on an
international health
passport card

38%

Communal spaces
conference/common rooms
created with anti-viral and
anti-bacterial materials

31%

Robotic sensors that do
temperature checks of all
consumers and employees
entering public spaces

14%

Use microchips in humans
to monitor and access their
health and location
information

49%

*say dispensers of free face masks
and hand sanitizers in public spaces
and high traffic locations should be
developed to safeguard public health
in the future*

*Some tried and true solutions are low
tech such as merely making PPE and
hand sanitizers available to all for
free and accessible*

THE MASK DEBATE

The best approach to mask wearing compliance is to make it a government regulation.

CS2. While in public work areas or public gathering places such as stores, restaurants or parks, people are being required to wear protective masks. Why, if at all, will you comply and wear a protective mask?

	Global Total	U.S.	UK	China	South Korea	Italy	Germany	Canada
<i>Will wear a mask to protect myself AND others (NET)</i>	41%	39%	34%	39%	58%	43%	34%	41%
<i>Will only wear a mask because it is legally required (NET)</i>	16%	14%	26%	7%	5%	17%	26%	17%
<i>I will not wear a protective mask in public areas even if it is required</i>	3%	6%	5%	0%	1%	2%	3%	6%

COMPANIES CREATE SAFETY FOR CUSTOMERS AND EMPLOYEES WITH TRANSPARENCY, INNOVATION AND TECHNOLOGY

	Global Total	U.S.	UK	China	S. Korea	Italy	Germany	Canada
<i>Honest, simple information about the company's plan to provide customers with safe conditions in their public spaces (such as stores, restaurants, etc.)</i>	49%	49%	57%	41%	49%	43%	47%	58%
<i>Re-design and reconfigure workspaces and public spaces with physical barriers for social distancing</i>	47%	44%	57%	39%	51%	42%	42%	54%
<i>Use touchless payment methods</i>	47%	44%	62%	36%	54%	31%	40%	60%
<i>Having innovative new ways to deliver products and services that increases convenience while still maintaining health and safety measures</i>	43%	40%	47%	39%	50%	42%	35%	49%
<i>Take temperature check of all entering public spaces (such as stores, restaurants, etc.)</i>	41%	42%	44%	42%	57%	45%	18%	38%
<i>Use apps that trace where someone has been or has been identified as being exposed before allowing the person to enter the public space</i>	32%	24%	35%	39%	45%	30%	27%	26%

Q: Thinking about the Coronavirus/COVID-19 and there being no vaccine at this time, which of the following should companies be doing, to support their customers and employees with businesses re-opened?



WHAT CAN WE DO TODAY

SHOW YOUR COMMITMENT TO DOING THE RIGHT THING WITH COMPASSION, EMPATHY, AND SHARED VALUES

BE AUTHENTIC. LIVE YOUR VALUES.

Issues and consumer and employee expectations are reshaping their definition of what it means to being committed to doing the right thing.

Your values are on display. Consumers are evaluating your actions.

Acknowledge that the fear is real – and it's been a key driver in keeping people safe

Put people first through behaviors of shared responsibility, sacrifice and values

Let science and trusted experts lead the conversation about “return”

Demonstrate patience and empathy as consumers seek to regain their own sense of control

BE CARING

Be ready to show how far your organization has gone to retain its workforce, and to provide those who lose their jobs with benefit payments or rehire programs.

Consumers expect brands and employers to do everything possible to support them and society.

Use science, even if it is not perfect, to guide safety decisions rather than economic pressure. Consumers want to hear directly from medical professionals and trusted public health officials that their world is getting safer.



FLEISHMAN
HILLARD

TRUE GLOBAL
INTELLIGENCE

INFORMATION

FOR QUESTIONS RELATED TO THIS STUDY CONTACT:

Natasha Kennedy
Global Managing Director
Natasha.Kennedy@trueglobalintelligence.com

Catherine Reynolds
Global Healthcare and Reputation Insights
Catherine.Reynolds@trueglobalintelligence.com