Remaining Relevant Amidst a Global Health Crisis – Part 4

W2O's Relevance Quotient Helps Organizations Stay Attuned & Ahead
Covering Activity up to April 27, 2020
Our Fourth Report in the Series …

...updates our previous three COVID-19 Relevance Reports with data through April 27 and incorporates a US state and local perspective, a California-specific analysis and a look at policy-maker and advocacy group engagement.
What Are We Learning After Two More Weeks?

Relevant companies are focused on **balancing tensions**:

- **National:**
  Inconsistency in leadership and inaccuracy of claims often at odds with the experts.

- **State (+City):**
  As trust shifts away from the federal government, governors are driving the agenda sometimes in conflict with city mayors.

- **Public Health:**
  Maintaining restrictions until the curve is flattened.

- **Societal Good:**
  Organizations providing goods and services for free or at significantly reduced prices.

- **Benevolent Actions:**
  Organizations continue to empathize with and support stakeholders more than marketing to them.

- **Economy and Civil Liberties:**
  Debates and protests over easing of restrictions. Debates between state and city-level officials.

- **Sustainability of Business Operations:**
  The long-term implications of operating at lower revenue levels.

- **Marketing:**
  Some organizations are realizing it’s OK to market to consumers on something unrelated to COVID-19 while others suspend advertising or donate advertising funds to small businesses.

- **The New Normal:**
  COVID-19 put a magnifying glass on pre-existing macro trends such as organizational digital transformation and innovation.

- **The Next Normal:**
  COVID-19 is accelerating those macro trends. Organizations that are seeing a relevance bump are thinking about how to sustain it post-COVID-19.
Before Diving Into the Last Two Weeks, Let’s Recap What We Mean by Relevance
Companies That Are **Relevant** Behave Differently and Solicit Different Stakeholder Engagement

**Relevance Quotient**
- a data-driven, agile way of thinking and operating that is attuned to societal and cultural currency

**Relevance Quotient**
- **A One-dimensional Measure:** it is multi-dimensional, multi-directional, multi-source and multi-audience
- **Only Impressions or Media Mentions:** it is not only about the number of articles or mentions in coverage
- **Only Quantity of Content:** producing the most content, shares or engagement does not make you relevant
The Relevance Quotient Maps and Closes the Gap Between...

...what **companies** need to say, want to say, and are saying

**Company Expertise**
- Capabilities
- Lines of Business
- Future Growth

**Stakeholder Expectations**
- Policy/Politics
- Technology
- Cultural & Generational

...what **stakeholders** want from, and are saying about, the company

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**Relevance: Taps into Cultural, Society, Political Currency & Urgency**

- Digitally attuned to stakeholder discussion, wants, needs
- Topical, timely
- Interesting
- Genuine
- Bold, provocative platform
- Differentiating
- Disruptive
Understanding (and Measuring) Relevance

Relevance Companies Are:

- Thought About
- Engaged With & Talked About
- Believed In

Measuring Relevance Accounts For:

Core Signals
- Search Interest
- Key Stakeholder Engagement & Discussion

Key Stakeholders
- Patients
- HCPs
- Employees
- Researchers
- Advocacy Groups
- Financial Analysts
- Policy Makers
- Healthcare Ecosystem

Advocating for the Company’s Positioning

Believed In
We’ve Been Tracking the Relevance of 240 Companies for 3 Years...

...and Being Relevant Was Hard Enough in 2019.
Few Companies Are Truly Relevant

Only 6% of 140 healthcare companies registered a strong relevance in 2019; none registered as resilient.

Only 8% of Fortune 100 companies registered a strong or resilient relevance in 2019.
Breaking Through Is Hard Because the Topical Landscape Is Noisy

This is the healthcare media landscape. Macro themes are contentious and it can be challenging to differentiate or be portrayed positively. To be relevant, companies need a proactive, sustained and differentiating narrative that is attuned to and aligned with stakeholders.

Shares as a measure of what’s capturing attention and what people feel strongly enough about to amplify:

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<tr>
<th>Rank</th>
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<td>Drug Costs/Pricing</td>
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<td>Vaping/Tobacco</td>
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<td>Mental Health</td>
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<td>Healthcare System/Plans</td>
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<td>Politics</td>
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Then COVID-19 Changed Everything
COVID-19 Continues to Dominate the Media Narrative

91% of all shares since January 1, 2020 were COVID-19 related; but engagement is waning

Shares as a measure of what’s capturing attention and what people feel strongly enough about to amplify:

Share Activity is Waning Since a Peak Late March

January 1, 2020 – April 27, 2020, 230,000 articles, 598M shares on Twitter, Facebook, Reddit. Based on a media outlet white list of 150 US publications.
Until Two Weeks Ago, New Topics Continued to Emerge as the Crisis Unfolded; Few New Topics Have Emerged Since and Most are Waning

Shares as a measure of what’s capturing attention and what people feel strongly enough about to amplify.

So What?

In two weeks, the range of COVID-19 related topics appears to have stabilized.

We see an **uptick in engagement around economic downturn** and **social distancing** as states ease restrictions.
Which Companies Are Most Relevant to Key Stakeholders on COVID-19

Covering January 1 – April 27, 2020
Who Is Most COVID-Relevant and Why?
Covering January 1 – April 27, 2020

**Other Industries**

1. **Be Human, Empathetic, and Authentic:**
   Companies are creating opportunities to engage and bond with consumers while remaining authentic to their brand. In recent weeks, relevant companies have made long-term strategic business decisions and adapted products and services for a new virtual world.

2. **Balancing People With Profits Is Critical to Driving Positive Relevance:**
   There is increased scrutiny on companies at both ends of the spectrum – those that are reducing or furloughing staff and companies who are seeing increased revenue amidst the pandemic. Companies that are seen as taking care of their employees first are generating strong engagement.

**Healthcare**

1. **Be Proactive and Solution-Oriented:**
   Companies that are identifying problems and offering solutions at their own cost are seeing well-deserved reverence.

2. **Be A Good Neighbor by Extending Your Expertise and Network:**
   Companies that leverage their skills and supply chains beyond the development of its core products see stronger stakeholder engagement.

3. **Continue to Act Local:**
   In recent weeks, companies that show they are working hard to positively impact the local communities in which they operate are seeing higher relevance.

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<thead>
<tr>
<th>Rank</th>
<th>Company</th>
<th>Up in rankings vs April 10</th>
<th>Down in ranking vs April 10</th>
<th>New to top 10</th>
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<td>Henry Schein</td>
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▲ Up in rankings vs April 10  ▼ Down in ranking vs April 10  ▶ New to top 10
## Who’s Gaining Relevance?

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<thead>
<tr>
<th>Company</th>
<th>What They Did</th>
<th>What It Delivered</th>
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| **Boston Scientific** | - Boston Scientific will start manufacturing a low-cost ventilator developed by the University of Minnesota, as a back-up alternative for doctors. The FDA granted the technology emergency use authorization amid the COVID-19 outbreak.  
  - In last week's report we noted that Boston Scientific reduced and employee wages 20% for 90 days for 36K employees globally and moved to a 4-day work week for many workers after a major decrease in elective surgeries results in decreased profits. This drove a 5% increase in relevance based on negative news coverage. | - Boston Scientific’s relevance score increased by 5% and its ranking moved up to #7 from #13.  
| **Vertex**       | - Vertex made an emergency offer of free cystic fibrosis medication for 90 days to the pan-Canadian Pharmaceutical Alliance if they agreed to negotiate in good faith and conclude on a Price Listing Agreement.  
  - Vertex announced that its nonprofit charitable foundation will donate $50K CAD to Food Banks Canada to support their COVID-19 Response Fund. The donation is part of the foundation’s $5M global commitment to support COVID-19 response.  
  - In France, Vertex announced donations through its foundation to local nonprofit organizations to support populations most impacted by the pandemic. The company’s foundation also donated to Feeding San Diego to support its efforts in providing much needed food to students who can no longer access meals at school. | - Vertex’s relevance score is up 13%. Ranking moved up to #20 from #57.  
  - Toronto Sun’s coverage of Vertex’s emergency offer of free cystic fibrosis medication generated over 7K shares. |
| **CRISPR**       | - CRISPR’s gene editing technology may scale to COVID-19 testing. Researchers published a study last week describing a new assay for the novel coronavirus that causes COVID-19 that uses the technique to deliver results in 40 minutes.  
  - CRISPR is helping to support the MTSSC Foundation’s “Masks for Sickle Cell Families.” The COVID-19 relief effort is providing masks for families affected by sickle cell disease. | - CRISPR’s relevance score is up 90%.  
  - News coverage on a possible COVID-19 test using CRISPR technology resulted in over 43K shares. The study released in *Nature Biotechnology* generated 21K shares, largely on Reddit. |
Outside of Healthcare, Some Companies Struggled with defining their narrative driving mixed relevance

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<thead>
<tr>
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| Disney  | • Disney announced two rounds of furloughs this month, totaling 100K workers. The company was criticized by Disney heir Abigail Disney on Twitter, claiming that the company is protecting executive bonuses and dividends of more than $1.5bn while cutting workers’ pay. Disney responded that executives including Bob Iger and Bob Chapek have made salary sacrifices to offset the financial impact of COVID-19.  
• Investment banking group UBS reported that Disney themes parks may not open until 2021.  
• Disney’s April 16 “Family Singalong” on ABC.com brought together a star-studded line-up to entertain families at home. The special raised awareness of Feeding America and its network for those needing support during the pandemic. A second singalong will air on Mother’s Day.  
• Disney's relevance* score is up 51% in two weeks and the company is currently ranked #7. The company has seen high relevance volatility dropping in and out of the top 10.  
• News coverage resulted in over 7M shares. Pop culture and Disney fan blogs were among the top shared.  
• Abigail Disney’s April 21 tweet generated over 69K engagements.  
• “The Disney Family Singalong” drew a 3.4 rating among adults 18-49 and 13M total viewers. | |
| Google  | • Google and Apple announced a partnership to build a contact tracing technology for their smartphone platforms. The opt-in technology would alert users if they have come in contact with a COVID-19 infected person. Privacy advocates have raised concerns because the technology involves sharing sensitive health information via mobile devices. Other experts are skeptical the technology would work and be able to replace old-fashioned methods of contact tracing.  
• Google’s score is up 25% while Apple’s score is up 46%.  
• News coverage resulted in over 800K shares in top tier outlets including Bloomberg, The Verge, and NBC News.  
• The announcement in Apple’s newsroom garnered 41K shares. | |

*Relevance does not necessarily mean revered. Relevance drivers can be mixed. Negative news can temporarily make you relevant for all of the wrong reasons.
Increasingly, Relevance Is Being Played Out Locally
New York & California Have Been Driving Significant Digital Engagement Since Early March With Other States Seeing More Recent Activity Related to the Easing of Restrictions

Shares as a measure of what's capturing attention and what people feel strongly enough about to amplify

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January 1, 2020 – April 27, 2020, 1.3M articles, 590M hares on Twitter, Facebook, Reddit. Based on more than 11K traditional online media outlets.
Local News Organizations Have Been Hit Hard, yet Remain a Vehicle for State and Local Governments


- Companies scaling back advertising
- Reporters getting sick
- Papers cutting/furloughing staff/cutting pay
- Outlets strapped for resources, can’t film content
- Smaller papers especially hard hit, but larger local outlets, and regional publishers impacted too
- Trust is shifting toward local news and business leaders as sources
Which Local Outlets Are Driving Engagement?

**WA - Top Local Outlets by Coverage Volume**

- Columbia Basin Herald: 2,468
- Seattle Times: 2,346
- Seattlepi: 2,081
- Yakima Herald-Republic: 1,572
- The Olympian: 1,396

**CA - Top Local Outlets by Coverage Volume**

- San Francisco Chronicle: 1,477
- Fresno Bee: 1,323
- San Luis Obispo Tribune: 1,272
- Los Angeles Times: 869
- The Sacramento Bee: 792

**TX - Top Local Outlets by Coverage Volume**

- Houston Chronicle: 3,026
- San Antonio Express-News: 2,988
- Laredo Morning Times: 1,767
- The Beaumont Enterprise: 1,160
- Fort Worth Star-Telegram: 1,123

**FL - Top Local Outlets by Coverage Volume**

- Bradenton Herald: 1,608
- Miami Herald: 1,464
- Sarasota Herald-Tribune: 678
- Orlando Sentinel: 475
- Naples Daily News: 385

**NY - Top Local Outlets by Coverage Volume**

- The New York Times: 2,667
- Albany Times Union: 710
- Newsday: 610
- New York Daily News: 494
- Daily Freeman: 456

**MI - Top Local Outlets by Coverage Volume**

- Midland Daily News: 877
- Traverse City Record-Eagle: 578
- Mlive: 485
- Detroit News: 435
- The Detroit Free Press: 360

**IL - Top Local Outlets by Coverage Volume**

- The Southern Illinoisan: 2,664
- Kankakee Daily Journal: 1,952
- The Chicago Tribune: 1,821
- Belleville News-Democrat: 1,138
- Herald Whig: 874
Governors Continue Driving Agenda as States Drive Their Own Policies and Timelines

While prior spikes were driven by governors proactively implementing stay-at-home orders due to a lack of federal guidance, they are now driven by governors proactively looking to reopen states and protests against stay-at-home orders.

Mentions in Traditional Media Coverage

- Andrew Cuomo
- Gavin Newsom
- Greg Gianforte (Montana)
- Gretchen Whitmer
- Jay Inslee
- J.D. Pritzker
- Greg Abbott
- Phil Murphy
- John Bel Edwards

Governors Generating the Most Engagement

- Andrew Cuomo
- Gavin Newsom
- Ron DeSantis
- Gretchen Whitmer
- Jay Inslee
- J.D. Pritzker
- Greg Abbott
- Phil Murphy
- John Bel Edwards
Mentions of Specific Local Issues Continue to Grow Over Time as Initial Topics Begin to Stagnate

As conversations around local employment begin to see a small decline, mentions of state budgets grow due to increasing pressures around the need for funding from tax and employment shortfalls.

$2.2T congressional relief bill gets signed into law, driving discussion about corporate bailouts and individual payments

Unemployment claims increase to all-time high of 6M

CBO reports national deficit will hit $3.7T; Gov. Cuomo criticizes Sen. McConnell for suggesting states should go bankrupt instead of receiving bailouts

Most Common 3-Word Phrases (Policy Subtopics) # of Mentions

- 500b virus aid 2012
- social security virus aid 1339
- medicare funds risk 1286
- congress delivers nearly 1035
- aid employers hospitals 772
- trillion economic decline 730
- jobless aid virus 703
- small business loans 686
- sought jobless aid 672
Nationally, Mayors* Are Increasingly Vocal as They Take a Greater Lead in Determining Policy

Local event cancellations, voting issues, safety regulations and enforcing shelter-in-place led mentions, particularly as some mayors begin implementing timelines and regulations in advance of state or federal government.

- 3/1: San Francisco Mayor London Breed announces ban on large gatherings including no fans for March Madness.
- 3/6: Austin Steve Mayor Adler announces cancellation of SXSW.
- 3/16: San Francisco Mayor London Breed -- in accordance with the health department issues -- orders shelter in place.
- 3/27: Surge in cases impacting local hospitals; lack of social distancing prompts mayors to close parks and trails.
- 4/24: As protests break out demanding the lifting of closures, some mayors, including Las Vegas Mayor Carolyn Goodman offered up the city as an early test case.

*Top 50 DMA.
Mentions of Mayors Initially Focused on Event Cancellations; Now Shifted Toward Stay-At-Home Orders and Employment

Mayors have become more and more proactive in setting policy for residents, particularly around safety measures and stay-at-home orders. In particular, they took leads in late March and early April as they led state/federal government in closures.

![Graph showing mentions in traditional media coverage over time for different topics such as event cancellations, face masks, local employment, and shelter in place orders.]

<table>
<thead>
<tr>
<th>Most Common 3-Word Phrases (Policy Subtopics)</th>
<th># of Mentions</th>
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<td>especially older adults</td>
<td>20,537</td>
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<tr>
<td>existing health problems</td>
<td>20,421</td>
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<tr>
<td>severe illness death</td>
<td>17,434</td>
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<tr>
<td>stay home order</td>
<td>16,161</td>
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<tr>
<td>health care workers</td>
<td>7,170</td>
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<tr>
<td>personal protective equipment</td>
<td>6,139</td>
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<tr>
<td>shelter place order</td>
<td>5,869</td>
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<tr>
<td>tested positive coronavirus</td>
<td>5,580</td>
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<tr>
<td>wearing face masks</td>
<td>5,235</td>
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<td>slow spread coronavirus</td>
<td>4,709</td>
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</table>
Policymakers* Argue Over and Promote the COVID-19 Relief Bill, While Demanding Answers on Virus’ Origin

**Most Active Policymakers**
- Sen. John Cornyn
- Rep. Dwight Evans
- Rep. Pramila Jayapal
- Rep. Don Beyer
- Sen. Rick Scott
- Rep. Kevin McCarthy
- Rep. Carolyn B. Maloney
- Rep. Andy Biggs
- Rep. Veronica Escobar
- Rep. Stephanie Murphy

**Most Shared Policymakers**
- Sen. Adam Schiff
- Sen. Elizabeth Warren
- Sen. Chuck Schumer
- Rep. Kevin McCarthy
- Sen. Bernie Sanders
- Sen. Tom Cotton
- Rep. Katie Porter
- Rep. Matt Gaetz
- Rep. Nancy Pelosi

*Policy Makers = Both Houses of Congress*
Advocacy Organizations Discussed Testing Heavily; Once Capability Increased They Pivoted to Other Topics

Some of the most active non-profits are professional societies advocating for healthcare workers. The most shared groups are professional societies and disease-specific communities with large online communities focused on sharing patient specific information.

Most Active Advocacy Orgs
- American Medical Association
- Veterans United March
- United Nations Foundation
- Massachusetts Medical Society
- National Association of County and City Health Officials
- National Foundation for Infectious Diseases
- International Monetary Fund
- Texas Medical Association
- Infectious Disease Society of America
- The California Health Care Foundation

Most Shared Advocacy Orgs
- National Institute of Health
- American Red Cross
- American Medical Association
- Creaky Joints
- Leaders Against Alzheimer’s Disease
- National Vaccine Information Center
- American Academy of Family Physicians
- American Academy of Pediatricians
- National Kidney Foundation
- The National Cancer Institute
California
Looking at California Specifically, We See a Focus on Tensions Between Public Health and the Local Economy

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So What?

In two weeks, we see a pronounced uptick in the engagement with topics related to the local economy.
Which California Media Outlets Are Driving Engagement?

1. SFGate
   San Francisco, CA
   3,053

2. San Francisco Chronicle
   San Francisco, CA
   1,477

3. Fresno Bee
   Fresno, CA
   1,323

4. San Luis Obispo Tribune
   San Luis Obispo, CA
   1,272

5. Los Angeles Times
   Los Angeles, CA
   869

6. The Sacramento Bee
   Sacramento, CA
   792

7. East Bay Times
   Walnut Creek, CA
   764

8. The Mercury News
   San Jose, CA
   753

9. The San Diego Union-Tribune
   San Diego, CA
   681

10. abc7.com | Los Angeles
    Los Angeles, CA
    576

11. NBC Southern California
    Los Angeles, CA
    416

12. NBC Bay Area
    San Jose, CA
    347

13. KRON4.com | San Francisco Bay Area News
    San Francisco, CA
    336

14. KTLA | Los Angeles News
    Los Angeles, CA
    333

15. Orange County Register
    Santa Ana, CA
    306

16. The Press Democrat
    Santa Rosa, CA
    301

17. Los Angeles Daily News
    Los Angeles, CA
    293

18. The Desert Sun
    Palm Springs, CA
    237

19. The Press-Enterprise
    Riverside, CA
    221

20. Pasadena Star-News
    Pasadena, CA
    211

Mentions in Traditional Media Coverage: January 1, 2020 - April 27, 2020
In Addition to State/Regional Media Outlets, Governors and Mayors Are Generating High Engagement

**State and local governments**, health experts and policy makers on the frontlines of the pandemic are *rising as a new class of health champions*—driving key decisions and serving as authorities for both local and national media.

Governor Gavin Newsom in response to protests regarding closing beaches

We’re **interested in evidence**, and the *evidence shows some good things, but some yellow flags* of caution. We can screw all of that up, we can **set all that back** by making bad decision.

Huntington Beach Mayor Lyn Semeta

Given that Orange County has among the lowest per-capita COVID-19 death rates in California, the action by the **State prioritizes politics over data**, in direct **contradiction of the Governor’s stated goal**.
In California, Mayors Breed and Garcetti Lead Mentions With Frequent Updates to Bring Clarity on Restrictions

Mayor London Breed generated early media engagement by being the first to issue a shelter at home order; however, Mayor Eric Garcetti received the most attention for consistent messaging and media engagements.

Mayors Breed and Sam Liccardo quoted in article about coronavirus early impacts to northern California

LA poised to become the next outbreak hot spot as Mayor Garcetti closes city beaches and trails

In coverage of CDC recommendations to wear face masks, Garcetti is recognized as being proactive on the issue

Lyft & Uber drivers demand PPE under Mayor Garcetti’s new order

Mayors Breed and Garcetti warn against 4/20 gatherings

Bay Area mayors order Shelter-in-Place

Garcetti (Los Angeles) Breed (San Francisco) Liccardo (San Jose) Faulconer (San Diego) Steinberg (Sacramento)
Most-Shared Articles Mentioning California Mayors Focus on Impacts of Shutdowns and Their Proposed Paths to Reopening

In particular, proactive actions taken in Los Angeles and San Francisco have received heavy sharing as audiences discuss the decisions and use them as ideas/barometers for their own local areas.

- Mayors Garcetti and Breed announce closure of all bars, restaurants after Trump limits gatherings of more than 10 people.
- Mayor Garcetti urges LA residents to wear face coverings in public.
- Articles focus on impacts of CA stay at home orders.
- Articles focus on reopening counties; Mayor Garcetti is quoted in article about how Hollywood plans to reopen.
So What?
Local Engagement is Needed More Than Ever – The Bar is Even Higher to Break Through

How can companies leverage local engagement to drive relevance?

<table>
<thead>
<tr>
<th>1</th>
<th>Calibrate a <strong>unique and precise approach</strong> based on city dynamic – it’s not one-size-fits-all across CA and it’s being driven by local government</th>
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<tbody>
<tr>
<td>2</td>
<td>Lean into <strong>analytics</strong> to get ahead of local trends to tie to (i.e. spread, stay at-home, economy) and elevate expected ones (re-entry)</td>
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<td>3</td>
<td>Prioritize push to the most <strong>influential local story tellers</strong> and most <strong>highly shared local outlets</strong> (i.e. San Francisco Gate, Fresno Bee); <strong>UVM ≠ relevance</strong></td>
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<td>4</td>
<td>Recognize the <strong>rise in “service journalism”</strong> AKA news you can use</td>
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<td>5</td>
<td>Package <strong>local voices, stats</strong> and <strong>trends/data</strong> that are relevant for local audiences</td>
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<tr>
<td>6</td>
<td>Offer <strong>dynamic assets</strong> that make reporters’ <strong>jobs easier</strong>—bite-size video shot like a reporter, infographics with local stats, pre-packaged quotes</td>
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<td>7</td>
<td>Think <strong>beyond traditional media</strong> with engagement – including <strong>advocacy orgs</strong>, government offices, influencers as channels</td>
</tr>
<tr>
<td>8</td>
<td>Be thoughtful about <strong>surround-sound amplification</strong> with geo- and audience targeting to extend shelf-life and cut through clutter</td>
</tr>
</tbody>
</table>
To Increase Your Relevance, You Should…

- Be agile and evolve your response initiatives to meet stakeholder needs.
- Make sure your actions match your words – and even better, your values, purposes, ethos.
- Engage with the long-haul in mind and show you have employee & customer needs in mind throughout the experience.
- Openness is the new transparency… It’s no longer a nice to have to be open with your knowledge/approach/ability to help, it’s expected.
- Unexpected partnerships are leading to amazing impact – from government to cross-industry – people are looking for interesting bedfellows.
- Pivoting is essential – from supply chain disruption to retooling facilities, identifying not what you can’t do, but what you can do increases relevance.
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