

Hello, NūLoop Partners!



COVID-19 THOUGHT LEADERSHIP > MAY 26, 2020
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+



Our Expertise



Government



Transportation



Energy



Education
& Social Programs



Consumer



Retail



Environment



Hospitality



Health

Our Clients

- Fortune 100 Companies
- Leading consumer brands
- 50+ top U.S. utility companies
- Most U.S. Federal agencies
- International, state and local governments
- 9 of the top 10 U.S. hub airports

COVID-19 Strategic Advisory Team

We have assembled a diverse team of senior ICF Next leaders—with expertise in a wide range of disciplines and industries—to guide clients through the challenging decisions we are all facing with COVID-19.

- Twice-weekly Coronavirus Impact Brief
- Virtual Spark Labs™ workshops to plan for recovery
- Launched *The Recovery Exchange* discussion series – upcoming topics include:
 - Upshifting Customer Loyalty: Driving Outcomes to Speed Recovery
 - Navigating the Tension Between Public Health & Employee Privacy

Coronavirus
Impact Brief sent
twice each week,
aggregating and
curating the most
interesting news
to help clients stay
informed and stay
resilient.

Coronavirus Impact Brief

Stay informed. Stay resilient.

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May 12, 2020 | Sent every Tuesday and Thursday

As part of our dedication to our clients, ICF Next has gathered helpful news highlights and insights to help you navigate this moment in time. Scroll down for industry-specific updates.

We have assembled a diverse team of experts to guide you through the challenging decisions we are all facing with COVID-19. A group of senior ICF Next leaders, with expertise in a wide range of disciplines and industries, are able to provide guidance. If you would like special counsel from our Strategic Advisory Team, please email your ICF Next main contact or SAT@ICFNext.com.

Our Perspective

As fear continues to subside, consumers are beginning to see a path forward. Learn more by reading the weekly insights from Brittany Paxman and Kristoffer Olson from the ICF Next Analytics team. The insights are from data sourced from YouGov's weekly COVID-19 tracker and other sources through May 11.

icf next+ CONSUMER INSIGHTS BY THE NUMBERS

1 Education Level a Key Indicator of both Government Support and Rate of Avoiding Public Places

As education increases, the opinion of government handling decreases, while the percent avoiding public places increases.

WHAT THIS MEANS: As with many issues related to COVID-19, behaviors and opinions are not uniform. Ensure your employee and consumer policies support a range of options, while staying within the parameters of your own organization/ brand principles.

52% 64% 71% 75% 82%

High School Some College or 2-year 4-year Post-Grad

Supporting Government Handling Avoiding Crowded Public Places

Source: YouGov COVID-19 tracker (4/30-5/7; n=3,319)

2 Those 'Very Scared' of Contracting COVID-19 Declined for Second Straight Week

A two-week decrease in fear occurred across all regions amidst a patchwork of loosening local government restrictions and emerging hotspots.

WHAT THIS MEANS: Any declining fear, even small, is a positive leading indicator for consumer confidence and ultimately consumer behavior. Some economists and policy-makers are now expecting the general economic recovery to look more like a 'swoosh' which would put recovery somewhere between the V-shaped and U-shaped scenarios.

% 'Very Scared' of Contracting COVID-19

12% 14% 19% 21% 19% 20% 19% 17%

3/19 3/26 4/2 4/9 4/16 4/23 4/30 5/7

Economists Say Economic Recovery May Look More like a "Swoosh" than a V-shape or U-shape

V shape Swoosh U

Sources: YouGov COVID-19 tracker (3/12-5/7; n=1,000-3,443 per week) and WSJ (5/11/2020)

3 Consumers Beginning to See Path Forward

Across all tracked categories, the level of uncertainty about when consumers believe they will feel comfortable returning has decreased. In addition, the number who believe they will feel comfortable returning to activities such as eating in a restaurant, going to a mall, and attending a work conference within the next month has seen a notable increase.

WHAT THIS MEANS: Even if you aren't certain about the timeline for your business, help your customers by communicating how you intend to help make them feel comfortable upon their return, whenever that will be.

Comfort Increasing

Responded 'In the Next Month' when asked how long until they believe they will feel comfortable

Eating at a restaurant Going to a Mall Attending a work conference

9% 14% 22% 7% 10% 18% 6% 6% 14%

Apr 7-9 Apr 22-24 May 5-8 Apr 7-9 Apr 22-24 May 5-8 Apr 7-9 Apr 22-24 May 5-8

Source: Morning Consult (4/7-5/7; n=2,200 per wave)

Communication Trends + Tools

- America's Shift to Depression-Era Values: The values rising most in importance are those associated with family, interpersonal relationships and self-sufficiency. They point to a heightened need for stakeholder listening and an expectation of companies and brands demonstrate their sense of responsibility and exhibit greater appreciation for economic hardships. ([IPRS](#))
- 150 Coronavirus Brand Messages Analyzed: The pandemic has led to an abundance of messages from every company on the planet about the coronavirus. This looks at the language used, the recommendations provided, who said it and how said, across 150 different organizations. ([RBB](#))
- How Businesses Can Emerge From Coronavirus: This crisis may be unique, but there are many lessons that can be learned from our past. This article offers eight critical lessons leaders can implement to transition out of crisis mode. ([Fast Company](#))

Employee Impact

- Employers Rush to Adopt Coronavirus Screening Tools: As businesses are beginning to reopen, employers are searching for everything from symptom-checkers to fever-screening cameras to use as they prepare for employees to come back to the office. ([NYT](#))
- The Race to Be the Last to Return to the Office: A number of companies, including Facebook, Google, Amazon and Capital One have announced work-from-home policies at least to the end of September, with some stretching to the end of the year. ([NYT](#))
- Adapting Diversity and Inclusion Efforts to Coronavirus Realities: Harvard Business Review discusses the need for business leaders to understand how responding to coronavirus requires diversity, equity and inclusion efforts. ([HBR](#))

Healthcare

- COVID-19 Is Widening Gaps in Health Equity: Many people who have been furloughed or lost their jobs are struggling to pay for basic needs, increasing the risk for food insecurity and homelessness. In communities of color, the coronavirus has exposed existing inequalities, causing an already unlevel playing field to tip over. ([Fierce Healthcare](#))
- New Creative Considerations for Healthcare Brands: As pharma companies begin to define the "new normal," what does it mean for healthcare agencies trying to help patients successfully managing their diseases, i.e., living more "normal" lives? ([Fierce Healthcare](#))
- The Healthcare Innovation Bubble: With the emergence of the coronavirus, the deep, broad recognition of our deeply fractured system of healthcare and public health and the long road ahead to improve on it. For the first time, we have broad recognition of both the power of American medical science and also its limitations. ([Forbes](#))

Retail + CPG

- CPG Brands Rush to Take Advantage of DTC Business: Top CPG brands including Kraft-Heinz and Pepsi, among others, are working to develop e-commerce and direct-to-consumer business lines. ([AdExchanger](#))
- Brands and Celebrities Team Up to Promote Virtual Proms and Graduations: Brands have stepped up to throw virtual graduation celebrations. Similarly, Jack in the Box and Chipotle are throwing virtual proms to ensure high school seniors don't miss out on the favored tradition. ([AdAge](#))
- Burger King Pilots Post-Lockdown App: Burger King Italy is piloting an app that will allow customers to order ahead and reserve tables. The app is an effort to convince consumers that it is safe to eat out again. ([Reuters](#))

Tourism + Hospitality

- Travel Companies Offer Free Vacations to Frontline Workers: Hyatt hotels and American Airlines are offering complimentary vacations as a thank-you gift to frontline workers in New York for their service throughout the outbreak of coronavirus. ([USA Today](#))
- The Return of Tourism: Australia is one of the top tourist destinations that has begun to outline how it plans to reopen its economy, including a focus on tourism. Some countries' plans include regional alliances that create travel bubbles or corridors for people to travel between safely. ([NYT](#))
- Ask for Customer Input Before Reopening: As some states begin to reopen, there is debate as to how restaurants should proceed and which safety regulations to abide by. As a response, restaurant groups have issued surveys to create a plan based on customer concerns and opinions. ([Plate Online](#))

Government

- How Is the Federal Government Doing at Guiding a Smart Reopening?: NPR's Steve Inskeep talks to Dr. Scott Gottlieb, former head of the Food and Drug Administration, and Andy Slavitt, who led the Centers for Medicare and Medicaid Services, about reopening the country. ([NPR](#))
- More Agencies Begin Delivering Masks, PPE to Employees: Several agencies are ramping up their delivery of personal protective equipment to employees who are still reporting to their normal workstations after months of leaving workers to fend for themselves to find masks and other materials. ([Government Executive](#))
- Coordinated Strategy to Accelerate Multiple Coronavirus Vaccines: Government, industry and academia have introduced a variety of vaccine candidates. More than one effective vaccine approach likely will be required to successfully protect the global community from SARS-CoV-2, the virus that causes COVID-19. ([NIH](#))

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4

Started with
making sure we
had the pulse on
the pandemic.

Now, we're shifting
into recovery and
planning.

Coronavirus Impact Brief

Stay informed. Stay resilient.

May 7, 2020 | Sent every Tuesday and Thursday

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Our Perspective

Past economic crises have shown there are patterns in how consumers change lifestyle financial and purchasing behaviors in reaction to collective challenges that we can learn from. Nissa Hanna from the ICF Next Brand Strategy team has identified key attitudinal and behavior shifts from the 2008 recession that can help guide your brand's response.

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1

Taking Control

When the world feels chaotic and uncertain, consumers look to have control and options where and when they can.

WHAT THIS MEANS FOR BRANDS:

With a heightened sense of anxiety and mortality, consumers are more likely to gravitate toward brands that help them establish a sense of security and agency.

THOUGHT STARTERS:

- When consumers feel unsure and overwhelmed, their world feels porous. Explore ways that your products, services and messages act as a safety net.
- Options give people a sense of control. Where applicable, help your audience see where they have choices.

2

Making Trade-offs

Consumers are prioritizing purchases and finding substitutions while opting for affordable quality-of-life "indulgences."

WHAT THIS MEANS FOR BRANDS:

Price is important but it's not the only factor in consideration. Elevate the functional and emotional value-adds like time saving and multifunctionality or comfort, happiness and normalcy.

THOUGHT STARTERS:

- Now is the time to elevate messages of getting more for your money. Consumers want to stretch their dollars as much as possible.
- Messages of sacrificing are ubiquitous right now, rightfully so; but where possible, illustrate how your product/service lets customers give back to themselves.

3

Looking for the Light

It's human nature to crave meaning and hope, and as consumers navigate a crisis, they'll be searching for the positive.

WHAT THIS MEANS FOR BRANDS:

When consumers are afraid, they look for allies. Help them make the most of their current situation in a way that makes it meaningful, not misfortunate.

THOUGHT STARTERS:

- Many consumers are currently stuck at home. Explore ways to help them find purpose.
- Consumers can be open to trying new things as they create a sense of normalcy. Think about ways to encourage new habits with free trials, entertaining guidance or by creating a sense of community around a product or service.

Communication Trends + Tools

- Aggregated Research for Communicators:** Every two weeks, the Institute for Public Relations compiles the latest coronavirus research relevant to communicators. Topics include leadership, professional development, communicating effectively, internal communication and more. ([IPR](#))
- Pivoting Marketing Strategies:** 16 market leaders share their response to coronavirus and share tactics they're using to reach audiences where they are. ([Attest](#))
- Coronavirus Pushes TikTok Creators to Serialized Shows:** With its growing popularity, an increase of free time and entertainers stuck at home, TikTok content creators are turning toward creating serialized shows over one-off videos. ([Morning Consult](#))

Employee Impact

- Coronavirus Drives Down Labor Force:** The April jobs report doesn't tell the full story. Morning Consult shares key insights on the pandemic's impact on employment, noting that the loss of income and hours is greater than layoffs and 39 percent of laid-off workers remain attached to employers. ([Morning Consult](#))
- How Leaders Are Improving Diversity and Inclusion During Pandemic:** With its growing importance, it is more important than ever that business and IT leaders are demonstrating an inclusive-minded culture with their teams and employees. ([Gartner](#))
- New UN Report Calls for Disability-Inclusive Recovery:** The pandemic has exposed and deepened the inequalities faced by those living with disabilities. A recently launched report calls for a disability-inclusive recovery and response plan. ([UN News](#))

Healthcare

- The Changing Nature of Healthcare Compliance:** There will come a time when compliance relaxations related to coronavirus will end. For this reason, it is important for health systems architect their SMS and mobile communication strategies for the long term. ([MedCity News](#))
- Palliative Care Takes to Telemedicine:** Recently, whether hospitalized for coronavirus or another disease, palliative care patients have received daily family visits via Zoom or FaceTime. When a patient is actively dying and the family is present remotely, the clinician will often stay at the bedside, holding the device. ([MedPage Today](#))
- Efforts to Beat Back the Coronavirus Are Making Clinical Trials Harder:** The coordination between clinical trials means that separate teams are investigating treatment intervention. Then, as case counts in some countries have crashed, there haven't been enough patients to fill the studies. ([STAT](#))

Retail + CPG

- Consumers Are Panic-Buying Pelotons:** With the closure of gyms and much of the population "sheltering in place" due to the coronavirus pandemic, consumers are "panic-buying" \$2,245 Peloton bikes. Since mid-March, Peloton's stock has soared 95 percent. ([NYTimes](#))
- Nike to Donate \$5.5 Million Worth of Products to Healthcare Workers:** Nike plans to donate 32,500 pairs of its Air Zoom Pulse sneakers to frontline healthcare workers. ([Business Insider](#))
- Wendy's Goes Hamburger-Free as Meat Production Decreases:** Consumers are beginning to feel the impact of meatpacking plant shutdowns as hundreds of fast-food chains halt hamburger service and grocery stores limit the purchase of ground beef and pork. ([NYTimes](#))

Tourism + Hospitality

- Post-Pandemic Travel Outlook:** Economists weigh in on the impact of the coronavirus on the travel industry and mobility restrictions moving forward. Initially seen as a shared global experience, many nations have taken considerably different approaches to recovery, which may result in a slowdown of global economic growth. ([World Economic Forum](#))
- Survival of the Fittest:** Wyndham Hotels & Resorts has begun to sign struggling independent hotels as a future growth strategy. The leadership teams are banking on independent hotel operators to rush to create branded opportunities to capitalize on larger reservation systems, loyalty programs and marketing budgets. ([Skift](#))
- Airlines Plan Fall Cost Savings:** In a memo to employees, United Airlines announced its plan to cut 30% of its management and administrative positions and displacements of pilots in October following the deadline of the U.S. government aid that bans job or pay cuts before September 30. ([Reuters](#))

Government

- For These Federal Employees, Telework Means Productivity Is Up:** Social Security field offices are closed. But the shutdown hasn't stopped the agency from processing claims for new benefits and appeals of benefit denials. According to statistics that the SSA sent its workers, the agency has been doing so at a faster pace than before. ([NPR](#))
- Protect Patient Privacy When Inviting Media Coverage, HHS Says:** Hospitals or clinics that invite media to their facilities to cover the coronavirus crisis still must comply with patient privacy rules, the Department of Health and Human Services warned in a guidance. ([Bloomberg Law](#))
- Big Tech Left to Steer Privacy for Contact Tracing Apps:** "Big tech" is a popular target of federal policy-making efforts that attempt to hold some of the most profitable companies accountable for protecting individuals' privacy. But when it comes to using applications to track the spread of coronavirus, roles are reversed. ([NextGov](#))

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5

Four principles for designing for the new normal



1

VALIDATE ASSUMPTIONS

- Openly listen to your people
- Drill down through conversation
- Proactively check your assumptions
- Recognize different needs
- Revisit your Vision, Purpose and Values

2

LEAD COLLECTIVELY

- Lead with trust and authenticity
- Put your purpose and values center-stage
- Stay connected to all your stakeholders

3

DESIGN EXPERIENCES

- Leverage your colleagues' insights and knowledge
- Adopt a more 'real time' and social approach to sharing content
- Create content that lives and evolves by using organizational and local voices

4

CREATE SHARED MOMENTS

- Harness multi-user platforms to create virtual experiences at key moments
- Use immersive engagement techniques that put your people in the story
- Create moments of mass participation, virtually and then physically
- Implement open source thinking – forging new partnerships



Latest. Greatest.

THE KEYS TO MANAGING THE BUSINESS CURVE OF COVID-19

To manage the business curve of COVID-19, start by understanding the three phases of this crisis: Panic and Disruption, Fear and Isolation, and Recovery and the New Normal.



The post-pandemic
opportunity for the
consumer packaged
goods (CPG) industry

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COVID-19 recovery is
inevitable, but are we
ready?

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Custom Industry Perspectives for Clients

COVID-19 RECOVERY

// Adapting to a new "normal"

There has been so much disruption to life as we once knew it. Social distancing. Work-from-home mandates. Non-essential businesses, schools and child-care facilities closed. Shelter-in-place and stay-at-home enacted. Skyrocketing unemployment claims. Market volatility. Travel halted. We have been forced to adjust and adapt to a new normal.


So what happens when this is "all over"? A few words come to mind—new expectations, skepticism, anxiety. The need for consumers to feel confident, safe and secure about the travel experience will be vitally important.

Airlines and the airports that connect them have been tested during the crisis in how they show empathy, flexibility and transparency. These qualities will continue to be just as important as ever as travelers begin to travel from their homes and begin to travel again.



// SHIFTING MINDSETS

A new normal means a new set of expectations and mindsets that the aviation industry, including travel and hospitality partners, will need to accommodate and adapt to. What once was, is no longer going to work (at least in the short term) in a post-COVID-19 environment.



CHALLENGES TO OVERCOME

"I've been able to conduct my work virtually the past few months, is there really a need to travel for this meeting?"

"If I do want to (or have to) travel, is it really safe to spend time at airports, get on airplanes or even stay in a hotel?"

"How will the airport check-in process, security checkpoints, shopping and restaurant experiences change to keep me safe and healthy?"

FIVE RECOVERY PREDICTIONS FOR AVIATION INDUSTRY

1. Volume will likely not regain its peak for at least 3 to 5 years, depending on the distance segment.
2. Pricing recovery will lag volume recovery by at least a year.
3. Business travel will recover more quickly than leisure travel, but at a permanently lower level.
4. Long-haul narrow-body aircraft will change the nature of international networks by replacing hub and spoke models with point-to-point flying (i.e., fewer connections).
5. Regional travel will move from an expensive business-oriented model to a cheaper leisure-oriented model.

Source: [Forbes](#)

COVID-19 RECOVERY

// Four Key Trends Impacting Travel Experience

New Expectations of Cleanliness

Travelers need to feel confident that the entire airport is regularly sanitized and as clean as possible. Investing in a combination of more "touch-point" cleaning by humans along with high-tech cleaning will make travelers feel better about the experience.

In Action: Cincinnati/Northern Kentucky International Airport (CVG) has become the first U.S. airport to deploy Avidbots' Neo floor-scrubbing robot, which autonomously cleans floors throughout the terminal on a continuous basis—avoiding people, suitcases, furniture, displays and other items.

Enhanced Health Safety Measures

Personal Protective Equipment (PPE), temperature checks, safety kits and individual proof of antibodies or a vaccine may become the new norm for travelers. With the heightened sensitivity for traveling while sick, airports and airlines need to work together to create and reinforce policies that help keep travelers safe and put them at ease.

In Action: Airlines, including Delta, Alaska and Spirit, are temporarily leaving the middle seat unfilled to accommodate social distancing. This could be the new normal for travelers at airports, trains and bus stations.

More Awareness of Environmental Impact

Significant declines in air pollution have been on full display with the world shut down. Aviation partners need to continue to reduce their carbon footprint, as train travel is touted as more environmentally friendly and less crowded (plus, they have windows that open for fresh air).

In Action: Alaska Airlines, the Port of Seattle and Boeing are partnering with the goal of powering all flights by all airlines at Seattle-Tacoma Airport with 10% sustainable aviation biofuel by 2028. Sea-Tac is the first U.S. airport to lay out a long-term plan to incorporate aviation biofuel into its infrastructure.

Boost in Contactless, Touchless Technology

An increased reliance on virtual connections and e-commerce—along with hygiene concerns—brings a new comfort level with an emphasis on contactless and touchless technology. Biometrics at security and mobile apps that facilitate payments and food and beverage orders/delivery will give travelers more peace of mind.

In Action: NEC, the world leader in facial recognition with its technology used in airports worldwide, is testing security gates in Tokyo that don't require people to remove their masks. AI is used to reference the exposed part of a face against a database of registered images.

Sources: [Airport Technology](#), [USA Today](#), [The Points Guy](#), [PhocusWire](#), [Future Travel Experience](#)

Airport + Aviation

Spark Labs™

workshops help


virtually tackle


some of the most

critical response

and recovery


activities.






To support corporate business continuity and the need for agility during these uniquely challenging times, ICF Next's Innovation Team now offers a remote-first version of the Spark Labs workshops.


- ✓ Utilizes user-friendly online applications built for seamless collaboration.
- ✓ Provides a cost-effective and flexible alternative for bringing dispersed teams together to solve complex problems.
- ✓ Built upon the same proven formula as our in-person design thinking workshops.




Spark Sessions
The Innovation Management Workshop



Lightning Workshop
The Problem Framing Workshop



Design Sprint
The Solution Design Workshop




Strategic Planning
The Direction Setting Workshop

We designed our **remote-first workshops** from the ground up to be comfortable using the technology and are fully engaged in focusing on the problem. For each workshop, we assign a pair of facilitators who have experience with the technology.

Our workshops are broken into highly collaborative segments of 2 hours or less. This prevents fatigue and keeps participants engaged.

We ensure client comfort and confidence in the remote tools by providing self-study and facilitated onboarding activity options in advance of the workshop.





Visual cues on the screen provide clear verbal instructions.

Write one idea on each sticky note

Hint: Need more stickies? Just double-click on the canvas

Voting allows for prioritization

spark labs

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Visual cues combined with clear verbal and written instruction

Participants can collaborate easily in real time

Write one idea on each sticky note

Voting allows clear prioritization

Challenging times require different thinking.

Denise Holt
Partner, Strategy & Insights
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Contact Denise if ...

- You want to receive our twice-weekly [Coronavirus Impact Brief](#)
- You want to be included in [The Recovery Exchange discussion series](#) for executives and senior leaders
- You and your organization could benefit from our [expertise](#) to help think through how to approach and plan [for a successful recovery](#)

Thank you!