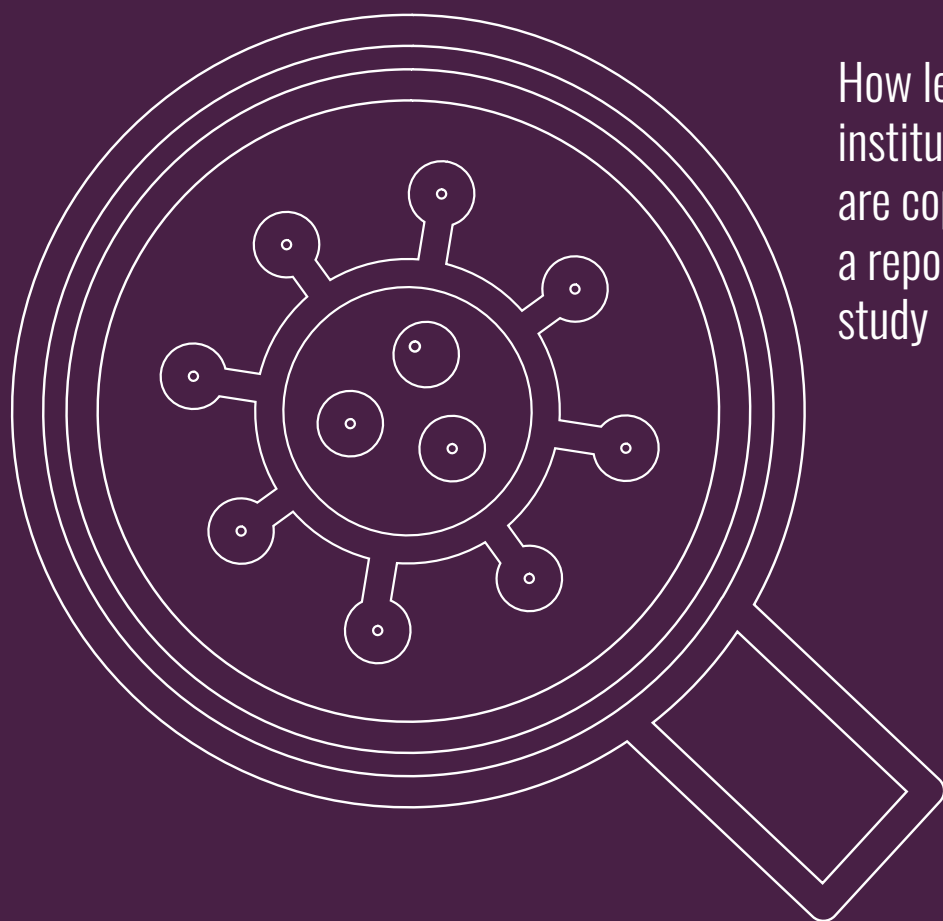


CRISISOMETER 2020

COMMUNICATION DURING THE PANDEMIC



How leading Polish companies, institutions and organisations are coping during the crisis – a report from the "Kryzysometr" study



From the respondents' responses emerges a new world of business and institutions changed by the pandemic, in which the role of communication, especially crisis and internal communication, has increased significantly

Adam Łaszyn, CEO of Alert Media Communications

Dear Readers, below we present the results of a study that show the point of view of PR specialists regarding changes in our daily lives caused by the coronavirus pandemic. A CRISISOMETER was used as a tool for this - a study conducted to summarise the calendar year. The situation in which we all found ourselves - the COVID-19 pandemic, caused our annual study to be conducted in the middle of the year as a special edition. We are dealing with the greatest challenge faced by companies and institutions in the 21st century.

We have already presented some of the results of this study in the media at the end of April. This report presents them in full. We also added quotes from the answers to open questions that were included in the survey.

I am convinced that the results of this special CRISISOMETER edition - like photos taken during a typhoon - will paint an interesting picture of the changes in which companies and institutions communicate. The extent of these changes will most likely be presented in the 2021 CRISISOMETER, which will be conducted in December 2020.

I would like to thank all respondents who participated in the special coronavirus edition of the study. Thanks to you we were able to generate this report and learn a bit more about how communication is changing around us.

Adam Łaszyn

101 PR and business communication specialists, institutions and non-governmental organisations
12 questions about communication

64%

of respondents believe that there will be permanent changes in the communication of companies and in the PR industry as a result of the pandemic and lock-down

THE ROLE OF COMMUNICATION IS GROWING

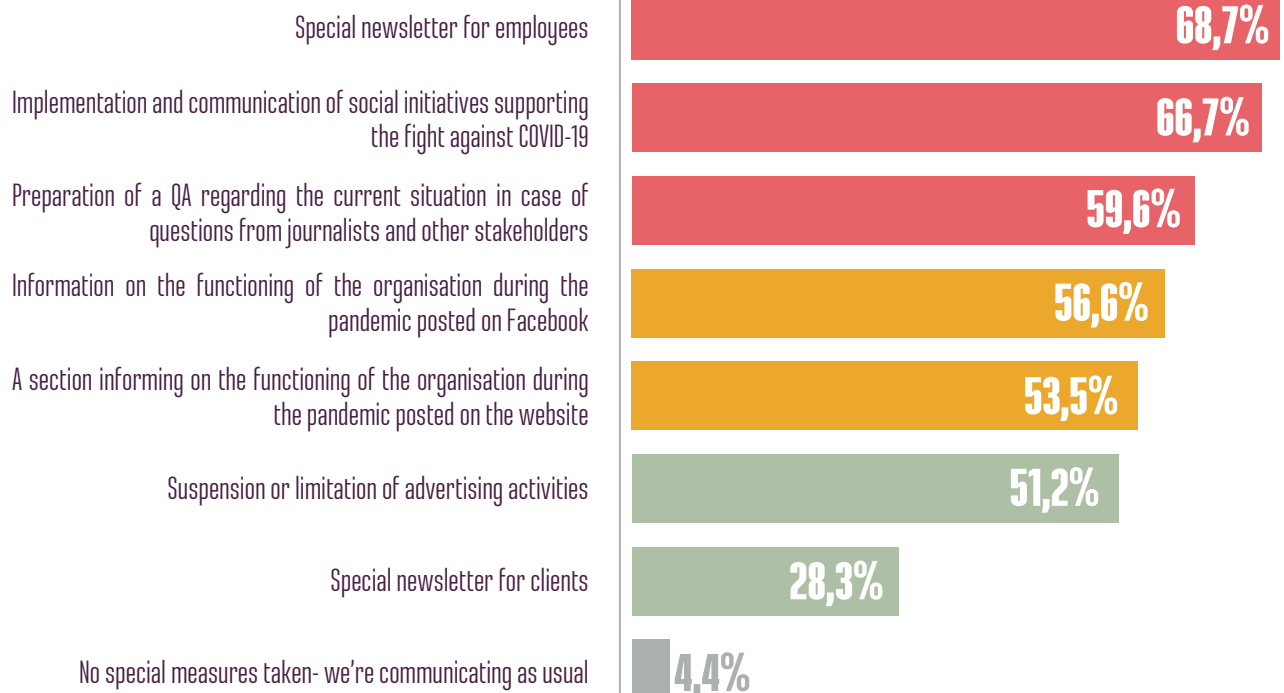
The coronavirus pandemic is a huge challenge for the communications industry. 70% of respondents rated the impact of COVID-19 on the communications department as very high (8 or more points on a 10-point scale). The coronavirus crisis requires communication specialists to look for new ways to reach stakeholders, including clients and employees, and only 1/10 of companies and institutions predict that they will continue to operate as they did before the pandemic. Changes in communication style and the tools used are no longer predictions, but facts.

It is already clear that there is a growing awareness of the importance of crisis communication, as well as CSR and employee communication activities. Managers are aware that without effective and planned communication, companies will fall into even greater chaos.

Work in communication is never a „9-5“ job, and now flexibility and quick adaptation are even more needed.

Let's take a closer look

What communication measures have been taken in your organisation in connection with the Covid-19 pandemic?



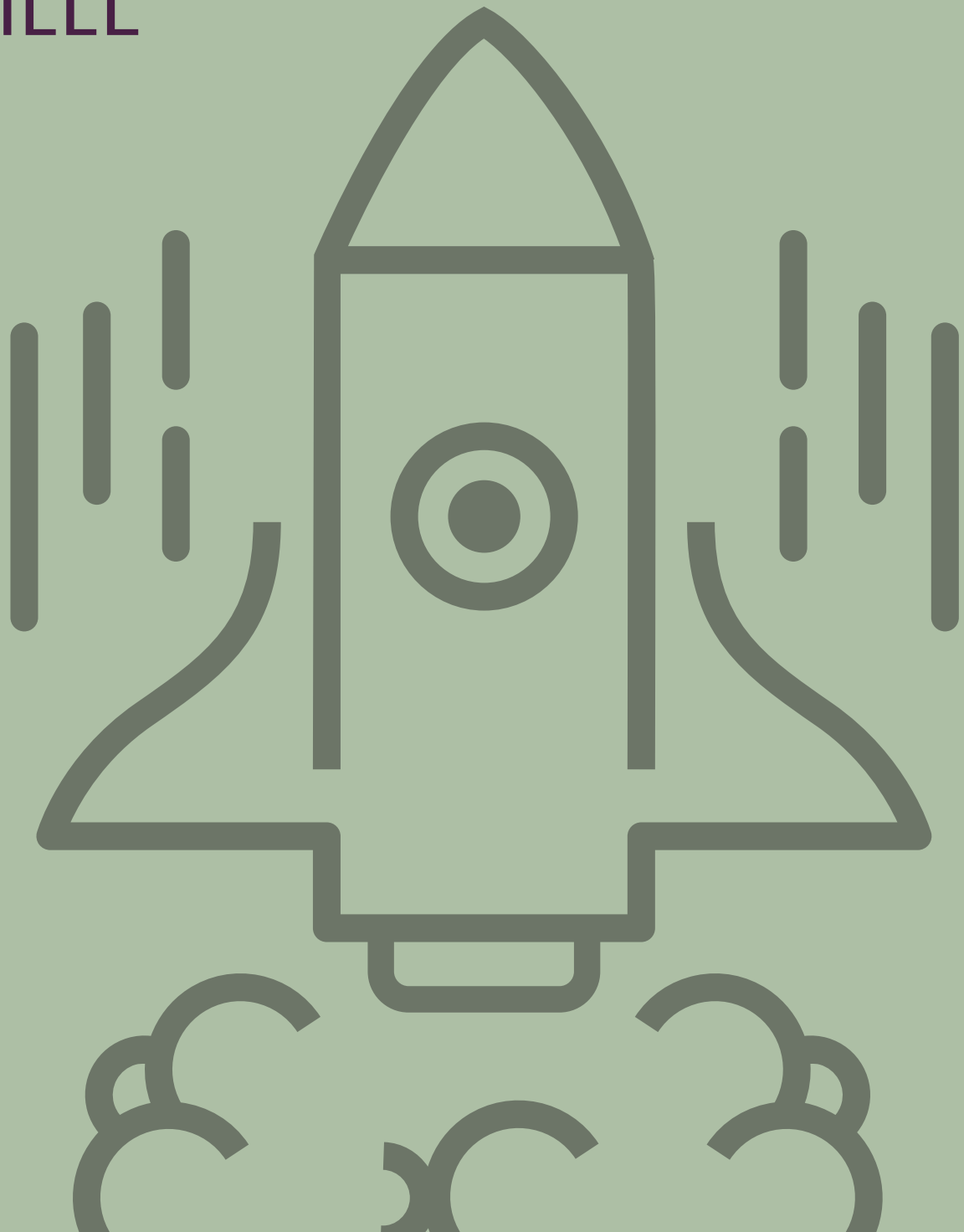
96%

of respondents introduced various types of special communication activities in connection with the pandemic

Newsletters have proved to be a key tool in the „home office era“. Current information about what is happening in the company today is like an umbilical cord in the remote work system. Our current experience shows that it is worth creating this new way of newsletter communication that incorporates crisis know-how into HR methods, which can greatly affect the relationship with a company that is physically far away.

CRISIS.

COMMUNICATION TAKES OVER
THE WHEEL



CRISIS MANAGEMENT TEAM

Experience shows that organisations without a crisis management team are plunging into the organisational chaos. According to the respondents, the three most important links of a crisis management team in the era of COVID-19 are: the CEO, the communications specialist and the HR specialist.

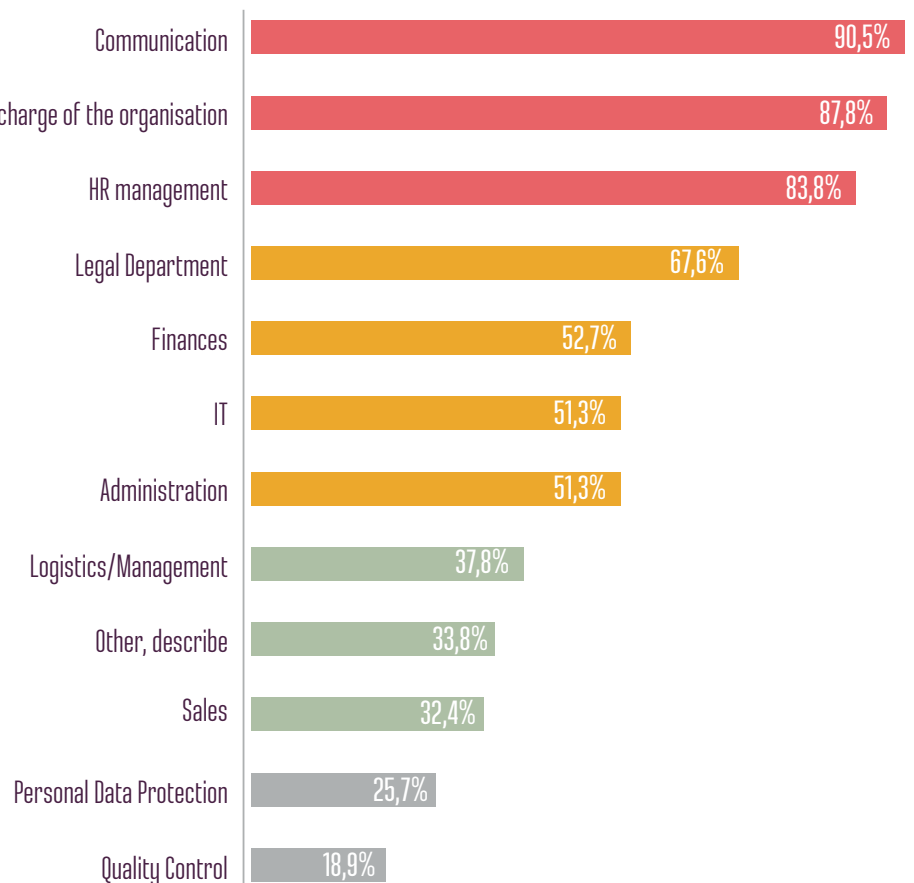
The pandemic causes crises simultaneously in many areas, including economic, employee and image-building. That is why selecting the right members to make up the crisis management team is one of the key elements to manage the emergency situation effectively.

Initially, clients said they don't need any help with communications, but in most cases it turned out they did.

In the private sector communication specialists are more often found on the crisis management team than the company's CEO (92% to 84%).

Let's take a closer look

Which specialists/members of which departments make up the crisis management team?



90%

of crisis management teams include a communications specialist

8/10

of surveyed companies, institutions and organisations in response to the coronavirus pandemic appointed a crisis management team.

Such a high percentage of organisations that include communication specialists in crisis management shows awareness of the social aspect of running a business. Communication has a great impact on the consequences of crises for organisations. Even more so now that it has mostly moved to the virtual world.

PREPARING FOR CRISIS

Crisis communication management starts long before the crisis appears, already at the preparation stage. The vast majority of the organisations surveyed prepared in terms of communication for the outbreak of crisis. Conducting such activities proves the maturity and crisis awareness of the management staff of three out of four surveyed companies and institutions.

Businesses appoint crisis managers, while public sector undergoes training

Private companies are **twice as likely** to appoint a Crisis Manager, compared to organisations from the public sector.

9/10 of organisations from the public sector underwent training in crisis communications. In private companies it is **1/3 fewer**.

87%

of organisations that prepared for crisis rated these activities as useful in communication related to the coronavirus pandemic.

Was your organisation previously prepared (before the appearance of COVID-19) for crisis communication management?

Business

75%

Public Sector

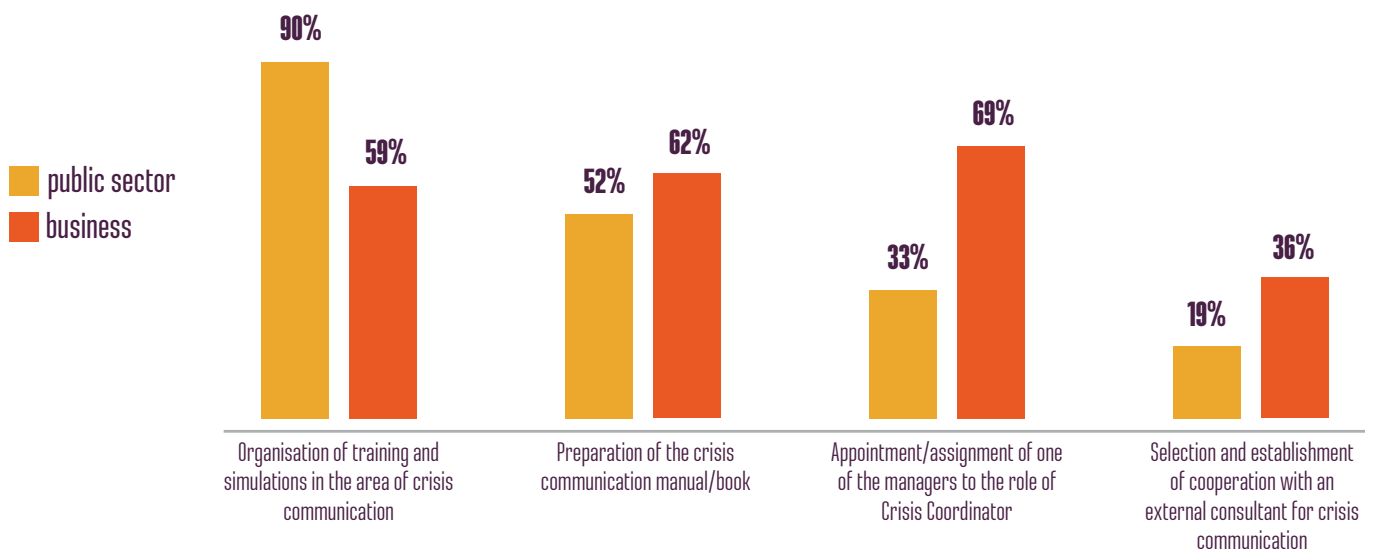
70%

9/10 of organisations from the public sector underwent training in crisis communications. In private companies it is **1/3 fewer**



Let's take a closer look

What steps did organisations take to prepare for the crisis?



INDUSTRY TALKS: WHAT SURPRISED US?

Respondents also commented on what surprised them with regards to the crisis and their work in the area of Public Relations. **Although there were some positive statements, the vast majority (over 62%) were negative.** They mainly concern legal, organisational and communication chaos. For many respondents, the reactions of customers and employees were also a negative surprise.

The rapid pace of legal changes. This makes press releases quickly outdated. Sometimes they are outdated before they're even published - especially when it comes to local media.

Lack of awareness among organisation leaders that decisions should be made quickly, responsibly and boldly. Procrastination damages the image of the organisation, both externally and internally

I was most surprised by the intensification of crisis-related content in published texts, and on the other hand the „flood“ of experts on everything, including mainly remote work and commentators on every piece of news, as well as the high risk of fake news and their verification.

Among the positive surprises are mostly those regarding remote work and the growing importance of communication in organisations. These constitute 45% and 50%, respectively, of all positive responses. The respondents indicated that companies quickly adapted to the new form of work. It also improved the functioning of the media and cooperation with them.

It surprised me how many things can be done through remote work.

Inability to predict further development of the situation, large-scale and rapid changes to the company's environment.

Lack of basic information about the enacted law.

The total unpredictability of consumer response to communication during the pandemic, the great difficulty in estimating what message could potentially be received negatively.

The issue of fake news is directly linked to information chaos. In the era of social media, this is very dangerous: sometimes this false information with flashy titles and shocking content spreads rapidly, falsifying reality. Fake news often spreads panic and fear, and contributes to image crises. In this case, the truth does not defend itself, and organisations that forget this may face unpleasant consequences, including those related to their image.

The speed with which the media switched to a new way of communication - all remote - previously existing on social media, now also on regular TV stations. Mp3 recording for radio journalists - simple and effective - good quality sound, without losses to recipient.

THE PANDEMIC.

TIME FOR MUTUAL SUPPORT



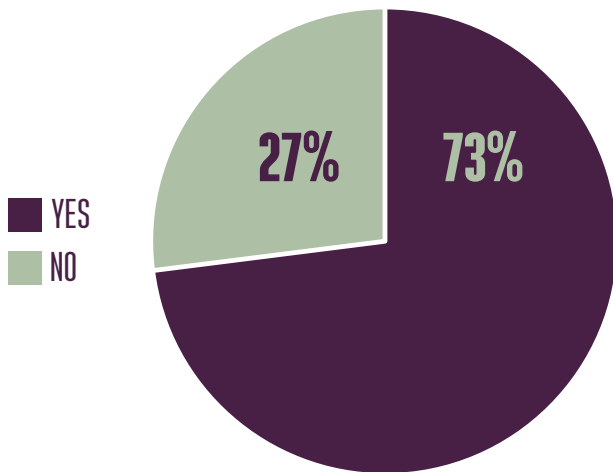
NEW MEANING TO CSR ACTIVITIES

Over 50% (51.5%) of the surveyed organisations suspended or reduced their advertising activities. At the same time, 67% of them implement and communicate social initiatives supporting the fight against COVID-19. This shows that currently CSR activities are not only pro-social, but also an extremely important channel to reach customers and a way to build a brand.

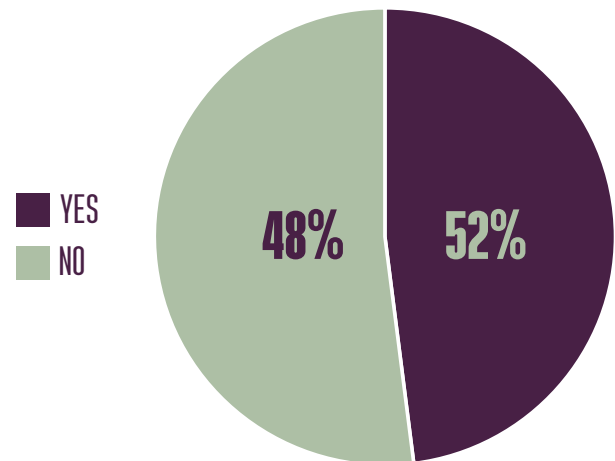
I was surprised by the unpredictability of Internet users' reactions to CSR actions.

There will be an increase in the importance of corporate social responsibility activities and greater consumer sensitivity in this respect; increasing requirements in the area of creating a socially beneficial offer and the need to constantly inform recipients about this (composition changes, society campaigns).

The study showed a clear difference in the involvement of private companies and public sector organisations in CSR activities supporting the fight against COVID-19.



BUSINESS



INSTITUTIONS, GOV'T OFFICES, NGOS

Value-based communication and the growing role of CSR will be important.

The coronavirus pandemic has demonstrated the importance of corporate social responsibility activities. Every other type of communication and promotion today carries many image risks that intensify the unpredictable reactions of clients on social media. Major companies are involved in supporting the fight against COVID-19, paving a new path in communication. Today, customers expect pro-social activities of a non-business nature. However, reaching customers is not enough. Far-reaching communication of this type of initiatives is needed.

TOP COMMUNICATORS

Communication during the pandemic is a very big challenge for everyone. This is an unprecedented event, which is why organisations have had to create completely new rules and forms of communication. Respondents indicated which companies, institutions or organisations fared best in the first two months of the coronavirus crisis and, in their opinion, communicated exceptionally well at that time.

The top three with an equal number of indications included two companies from the FMCG industry and one state institution:

Żabka

Biedronka

Ministerstwo Zdrowia

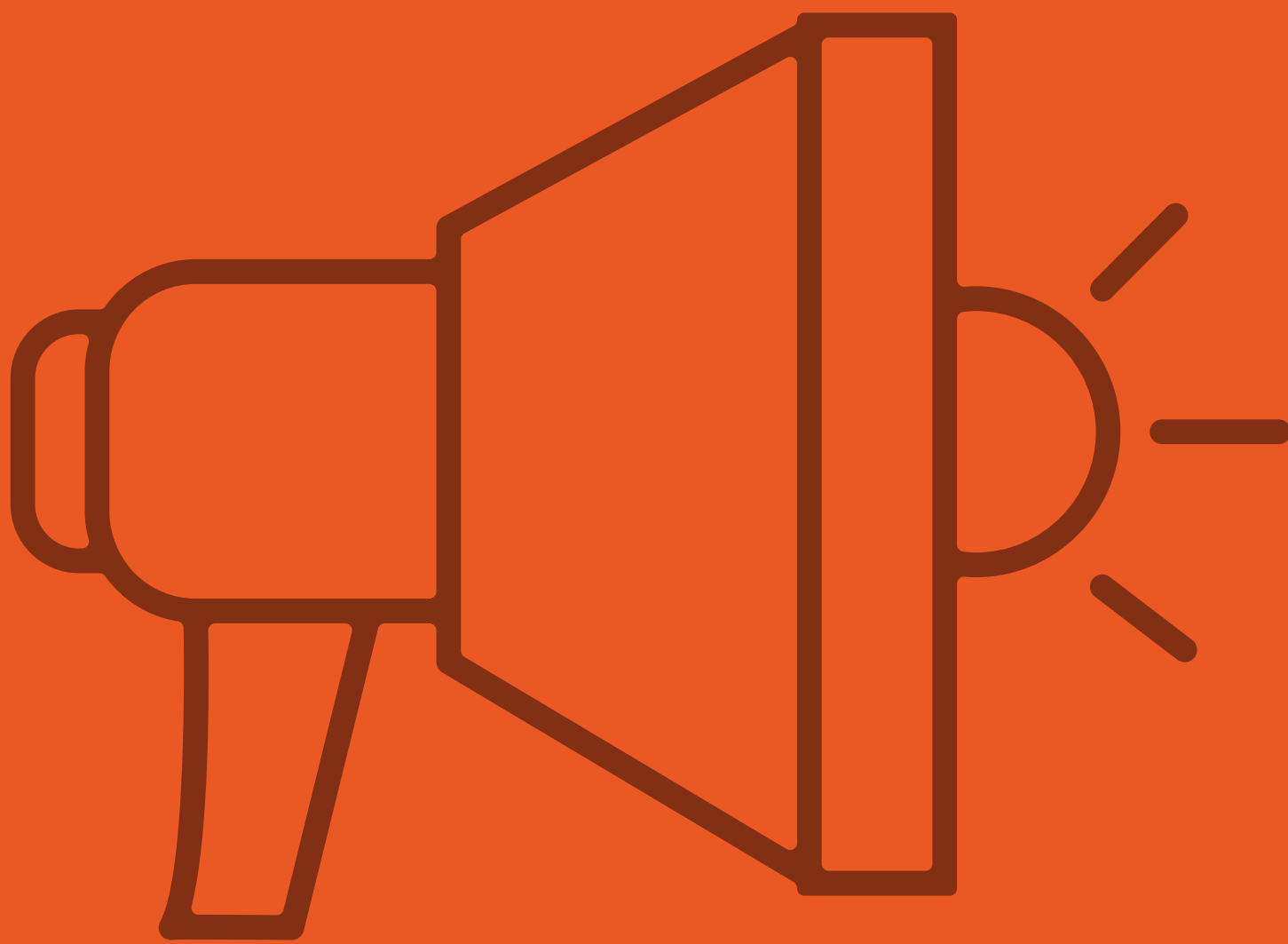
Very good communicators are those sewing masks, coveralls, printing visors for hospitals etc.

Ministry of Health - for its openness to the media, organising a way for journalists to work directly in the building of the department and calm, balanced and consistent communication of the spokesperson and the Minister of Health.



A NEW WORLD?

POST PANDEMIC PR



INDUSTRY TALKS: WHAT TO EXPECT?

According to the respondents, despite the potential reduction in spending on communication and promotion, the demand for selected Public Relations services will increase. This will mainly apply to crisis communication. Organisations now understand the importance of being properly prepared in this area, ensuring rapid response in the event of negative events.

Nearly half of the responses given (45.5%) concerned changes that mainly involve the form of communication. Due to the pandemic, organisations had to suspend corporate events, conferences or press breakfasts. Online activities are already gaining in importance - this is where both business meetings and communication with clients or other stakeholders take place, which involves developing techniques and tools adapted to these channels.

Increased interest in crisis procedures, increased marketing communication and cutting the cost of other types of communication.

The PR industry will certainly greatly promote the offer of crisis PR services (including anti-crisis prevention) and indeed the demand for these services will increase significantly.

Many companies will cut budgets for PR activities, PR will have to show greater impact on business and sales, the eco trend will collapse.

Organisations include communication scenarios for such a major crisis in their crisis communication books. Communication departments are better prepared for remote and online work by investing in tools (applications, systems) and equipment needed for effective operation in lock-down conditions.

Even more emphasis on online communication and e-PR, activities aimed at supporting online sales.

There will be an increase in awareness of the need for communication among entrepreneurs.

It depends on how long everything will last. Budgets will determine ways of cheaper online communication.

More frequent use of electronic means of communication (Skype, webinars, podcasts) and new technologies, which have proven to work exceptionally well these days.

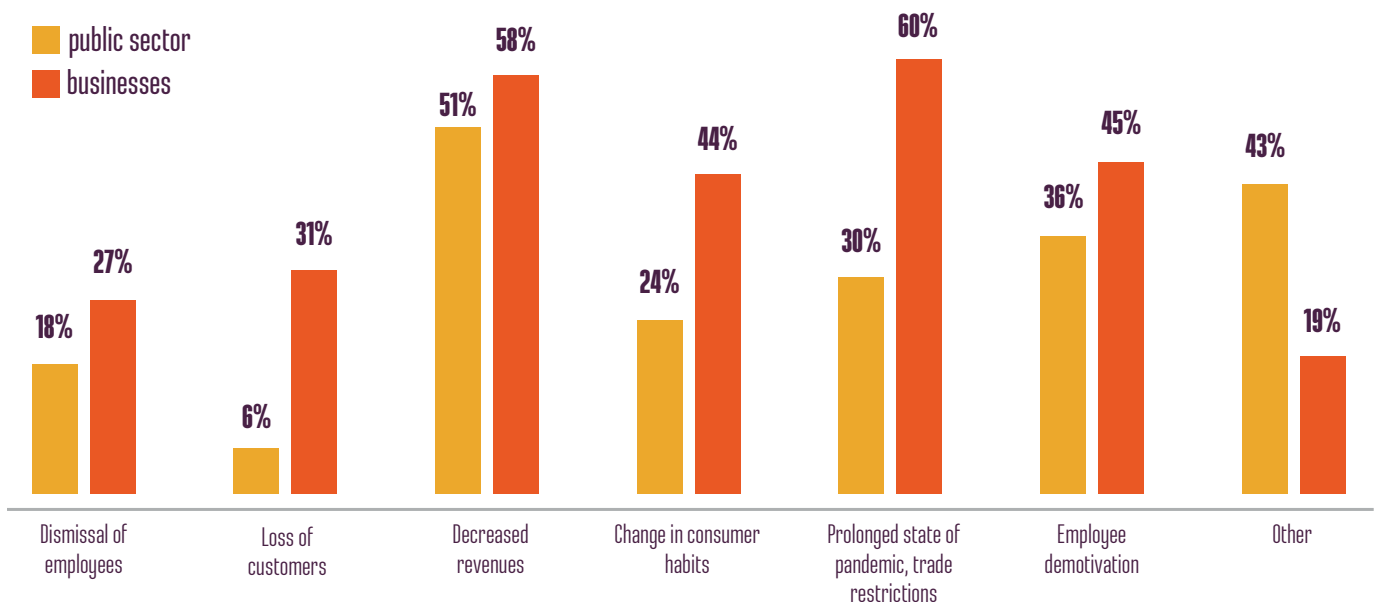
CONCERN CATALOGUE

The pandemic causes fear for the future in most companies, and predictions of the largest recession since the 1930s are exacerbating this fear. According to the entire research group, the most serious challenge in the current situation will be a decrease in revenues (55% of all respondents).

In the remaining categories of fears and worries there are clear differences between respondents from the business world and those who work in government offices, institutions or NGO's. The prospect of a prolonged lock-down worries twice as many of the surveyed representatives of commercial companies (60%) than those of offices and institutions (30%). The same concerns the challenge of anticipating changes in consumer habits. Over 44% of business communication representatives and nearly 24% of institutional respondents fear this. The biggest difference can be seen in the fear of losing customers: the business world is five times more afraid of this.

Let's take a closer look

What negative effects will be the biggest challenge for communications in your organisation?



In the other category, as many as 71% of respondents' concerns were related to the economic slowdown and legal chaos. The remaining 29% are issues related to loss of financial liquidity, communication and HR problems or difficulty in assessing the effects of the pandemic.

Organisations include communication scenarios for such a major crisis in their crisis communication books. Communication departments are better prepared for remote and online work by investing in tools (applications, systems) and equipment needed for effective operation in lock-down conditions.

The discrepancy between the promises of the government officials and the actual legal state of this aid in regulations, which de facto means high expectations of support by customers, with meagre legal instruments.

Investment slowdown affecting the satisfaction or lack thereof among the local community.

Work from home while taking care of children, technical organisational problems, new communication tools to master.

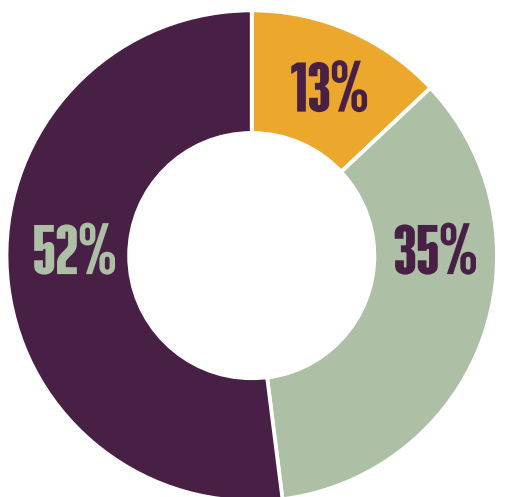
FUTURE.

HOW WE CHANGE PR ACTIVITIES



FUTURE COMMUNICATION MOVES

Communication in times of crisis and then recovering from problems is like a game of chess, here you also need to think a few moves ahead. Those who are already preparing the right communication strategies for the coming months will benefit from that, and there are a lot of them. Over 50% of companies and organisations from the public sector are already preparing communication strategies for when the coronavirus pandemic is over. However, the situation is so unpredictable that it is worth preparing different versions to be ready for various scenarios. Our experience of supporting clients in such processes shows that it is particularly worth analysing the less optimistic scenarios. And simply prepare communication for potential problems arising from the developing situation and the results of implemented activities. Knowing such results is easier than in chess.



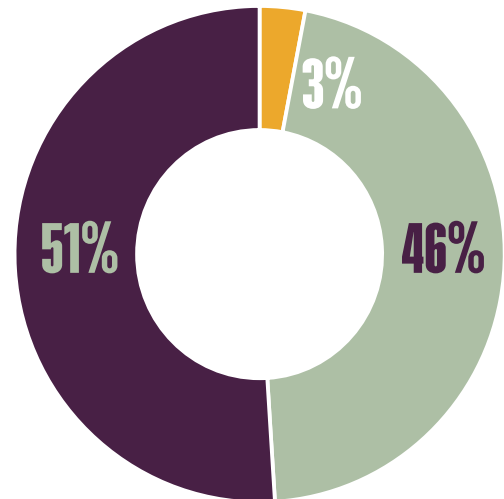
- Preparing a strategy for after the pandemic is over
- Have yet considered operations after the pandemic is over
- Plan to function as before

BUSINESS

Only 2% of public sector organisations plan to function and communicate as before. This is a great result, which shows a high level of awareness of the need to make changes and prepare for the future. Interestingly, in the business sector this value is slightly over four times higher (13%).

It is difficult to say for sure whether we are about to return to the old reality or rather face a „new world“. We are still in the time of forecasts and predictions, and each of these can be wrong. Already, however, we can see changes in consumer behaviour as well as the needs of employees stuck in home offices. Preparing a strategy of

Changes in communication will depend on how long everything will last. Budgets will determine ways of cheaper online communication.



- Preparing a strategy for after the pandemic is over
- Have yet considered operations after the pandemic is over
- Plan to function as before

INSTITUTIONS, GOV'T OFFICES, NGOS

operation and communication taking into account various scenarios is the best possible solution. A late start can cost us a lot, both in terms of sales and image.

I think that the marketing and communications industry will consider the needs of consumers even more CAREFULLY.

We are anticipating even more emphasis on online communication and e-PR, activities aimed at supporting online sales.

ABOUT THE STUDY

The special edition of the „Crisisometer - communication during the pandemic” study involved 101 specialists, managers and directors of communication, as well as spokespersons. PR service providers, i.e. employees of PR agencies, did not participate in the study. The study was conducted by the Alert Media Communications agency specialising in anti-crisis communication and strategic PR. It was conducted on 6-17 April, 2020.

Alert Media Communications is a PR agency specialising in crisis management, communication strategies and media tactics. Since 2002, agency consultants have advised on hundreds of problem and crisis situations, which makes Alert Media one of the most experienced crisis management companies in Poland, with a unique methodology in this regard. The agency's original tools and work style are characterised by an individual approach to each client and comprehensive solutions. In the field of crisis communication, Alert Media is a benchmark on the Polish image services market, while some of the aspects of its methodology - like the 5P Rule - have become market standards.

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