



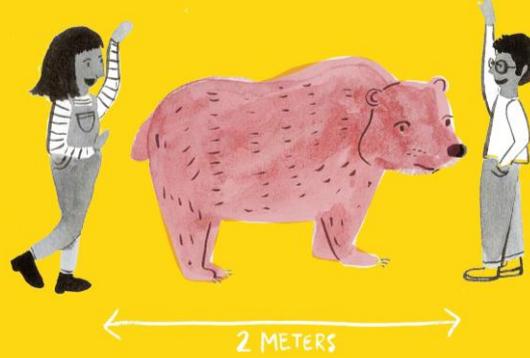
CREATIVE
CULTURE



HYGIENE AND CULTURE: THE IMPACT ON GLOBAL BRANDS

June 2020

INTRODUCTION



In the few short months since reports first surfaced that a novel form of coronavirus had been discovered in the Chinese city of Wuhan, COVID-19 has spread throughout the world and completely upended daily life for many of us. At the time of writing in late May 2020, the WHO figure for the number of people confirmed to have caught COVID-19 has climbed to over 5 million and only a handful of countries are yet to report their first case. Governments across the globe that differ from one another in almost every respect have faced the same dilemma: how do they protect their citizens in the absence of a vaccine?

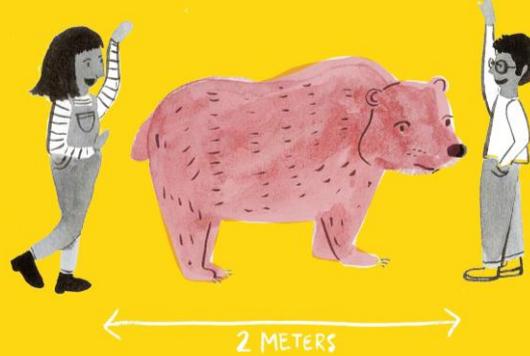
To date, the only viable solution has been implementing various hygiene measures and forms of social distancing, along with lockdowns and travel bans, aimed at slowing the spread of the virus and protecting healthcare systems from becoming overwhelmed. The service and hospitality industries have been some of the worst hit, with hotels, restaurants and bars around the world having been forced to close down or severely limit the service they can offer in order to comply with the restrictions and measures laid out by their respective governments.

As virus cases begin to drop and government restrictions ease, new regulations will be drawn up for the gradual and safe reopening of these businesses. This will undoubtedly present a new host of challenges for international corporations to ensure that they are up-to-date and in compliance with the latest safety standards in each of their local markets. However, it is not just the measures themselves that will differ on a country-by-country basis, but also the underlying attitudes and behaviours of locals, which ultimately translates into a need to localise the entire brand approach.

Whilst the last few months have been extremely testing for everyone, there are some key learnings that we can take away at this point, that will serve as vital information for companies looking to reconnect with consumers during this period.

Special thanks to Misha Dautovich, Feyi Olubodun, Marilynnda Suryandhari, Ernesto Samper Nieto, Anders Östberg, Giacomo Pastore, Jung Woo Sik, Nicola Allen, Tomoki Minohara and Katie Peacock for their cultural insights.

INTRODUCTION



The interaction between culture and COVID-19 is interesting in its own right, but what is particularly imperative for brands to consider in this context is the range of approaches that have been tried and tested by governments and other local organisations around the world. Measures have spanned the full spectrum from total lockdowns enforced by criminal sanctions to “guidance” and an expectation that citizens will exercise their best judgement. Similarly, the extent to which citizens appear to have followed these official regulations has varied from country to country. In many instances, these divergent paths are not purely dictated by the daily case numbers or experiences in past pandemics. They also reflect deep-rooted cultural beliefs and customs about everything from greetings to trust in government and other local authorities.

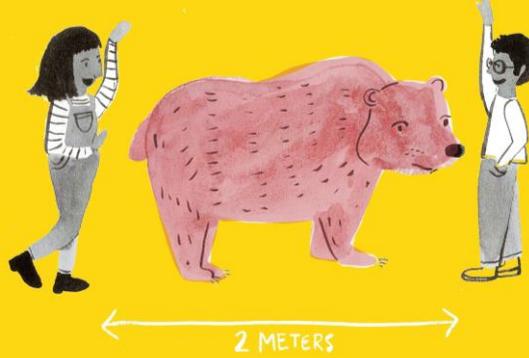
With some of the industry’s leading international hotels already launching plans and communications around new hygiene and safety measures (for example, [Hyatt’s Global Care and Cleanliness Commitment](#) or [Hilton’s Clean Stay with Lysol Protection](#)), it will be important to take into account recent events and the profound cultural discrepancies that have been revealed as a result.

What has daily life looked like for the target customer? What approach did the government take and how effective was it? Which cultural assumptions shaped the government’s thinking and the citizens’ response? What lessons can be drawn from this in terms of how companies in the service sector can ensure that their customers follow national and international advice on hygiene and social distancing going forward?

It seems likely that companies with clear answers to these questions and a determination to put the client, their needs and their primary concerns at the heart of the business model will perform best over the months to come. As well as making sure that they are complying with all applicable hygiene and safety measures laid out by law in their target markets, companies may decide to adapt the service itself, its delivery to the client, and the tone and content of marketing messages. With many company budgets stretched to breaking point by this unprecedented market downturn, it will be more important than ever to get it right.



TESTIMONIAL



Antoine Dubois, **Senior Vice President Global Marketing Strategy** at Accor describes what this entails for the Accor brand across their many markets.

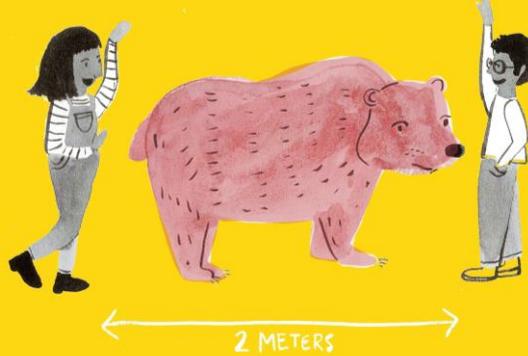
At Accor, we have decided on a single sanitary label name "ALLSAFE" to represent our new elevated cleanliness protocols and standards across all communications globally. This covers 12 different themes that take into account every aspect of the guest experience, with implications for both employees and guests themselves. What is key in the implementation, however, is considering the local relevance of each action we put in place. Using these themes as a foundation, regional hotels can adapt their plans based on the current situation, local regulations and cultural aspects. For example, distancing guidelines differ across countries; different buffet hygiene rules can apply and most importantly, we have to meet different local regulations for the cleaning and sanitisation of rooms. In each case, it is about striking the right balance.

The second aspect of course is the brand segment. As Accor has a large guest portfolio from the Luxury to the Economy traveller, we kept the 12 themes and each time added a service gesture tailored to the brand DNA and target profile. Simply using a friendly approach in communications is not going to be enough in this instance; you do not create reassurance for guests in Luxury with same approach as in an Economy hotel. What is key here is the tone for your communication and but also training staff appropriately for guest expectations.



In this White Paper, we will consider two approaches taken by multiple governments and organisations in order to encourage compliance with hygiene and safety measures throughout the pandemic: one based on national unity and collective responsibility, and the other focused on giving advice rather than orders. We will assess the extent to which these two frameworks were successful in a number of countries and the cultural reasons underpinning the extent of their success. We will also look at approaches and hygiene measures that are already being rolled out by local brands as they begin to reopen their facilities and break down what we can learn from all of this to improve the customer experience in service and hospitality at this crucial time for companies in the industry.

MANAGING THE COVID-19 CRISIS



NATIONAL UNITY AND COLLECTIVE RESPONSIBILITY

In some countries, governments have sought to encourage citizens to modify behaviour through messaging that focuses on coming together to protect each other. As we will see, this approach was relatively successful in Italy, Australia, South Korea and Canada but the argument was less persuasive in Nigeria, Colombia and South Africa.

ITALY

Italy was the first country in Europe to experience a major outbreak of COVID-19 and the first to impose a nationwide lockdown, which began on 9 March. Despite severe restrictions on business, travel and social interaction, the country has suffered one of the world's deadliest epidemics to date, with the WHO reporting 32,785 deaths to 25 May 2020. Among the reasons for this include the country's status as a hub for international tourism and business travel and its demographic structure. Italy has the oldest median age in Europe and due to a close family structure, Italians are more likely to interact with individuals from other generations than nationals of other countries, according to a recent study in the journal *Demographic Science*. Italy also has quite a tactile culture in which physical contact plays a key role. Taking into account these strong cultural elements that pose a challenge to confinement measures, the messaging from the Italian government and local brands has been one of pride in Italy and Italian culture as well as optimism for the future. Italian PM Giuseppe Conte's comment "*torneremo ad abbracciarci*" (we'll hug each other again), acknowledging how hard it is for individuals to limit physical contact, especially in a country such as Italy where this contradicts deep-rooted cultural norms, has become an unofficial motto along with the phrase "*andrà tutto bene*" (everything will be OK).

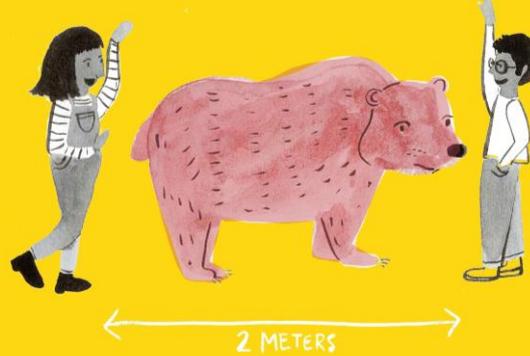
Brands such as Barilla, national television and supermarket chains and even sports teams have all produced advertising with [Publicis Italy and Sophia Loren](#), linking pride in Italy with praise for healthcare workers and encouragement to comply with lockdown restrictions.



Takeaway for service-sector companies

- As one of the first European countries to be severely affected, Italy has suffered a particularly acute psychological blow. Companies operating in the service sector should bear in mind that additional hygiene and safety measures will be needed to help customers feel secure. Tone of voice will be crucial for all brand communications; it is important to ensure that what comes across to the reader is a genuine desire to put the customer and their safety first.
- Pride in Italy and Italian culture has brought the nation's citizens together in the face of this crisis. Some brands may choose to pick up on this theme in their communications.

MANAGING THE COVID-19 CRISIS



AUSTRALIA

Australia entered lockdown gradually, with mass events such as the Grand Prix banned from 13 March, international travel prohibited from 18 March and gatherings limited to no more than two people not living together from 29 March. Throughout, the government's messaging has focused on thanking citizens for their efforts and emphasising the idea that the strong should change their behaviour to protect the vulnerable. This is exemplified by the core graphic, which has become somewhat of a logo used on posters and other government communications, in which the call to action relating to the community ("help stop the spread") is far bigger than the message about the benefit to the individual ("stay healthy").

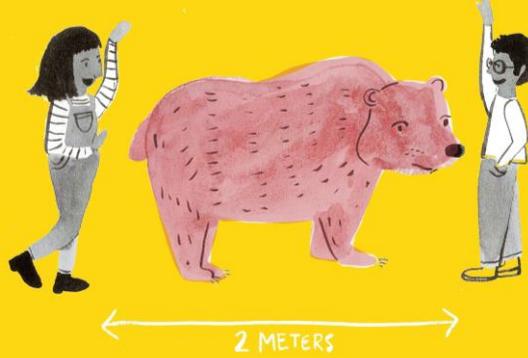


While the government's approach has not been without critics, it has drawn on strong cultural values of community with a sense of pride in being the underdog and Australia has undoubtedly been spared the worst of the epidemic, with just over 7,000 total cases and 100 deaths to 26 May. The country is now easing lockdown measures, although the pace of change is in the hands of state authorities and the rules differ at state level.

Takeaway for service-sector companies

- The idea of the strong protecting the weak seems to resonate particularly well with Australians, so this could be an effective starting point for marketing and brand communication strategies relating to COVID-19. For example, restaurants might produce signage with the message: "By keeping your hands clean at our facilities, you're helping to protect the vulnerable".
- What's more, as a country with a strong consumer preference for ethical businesses that support important local causes, locals are likely to choose companies that communicate an awareness of this and show themselves to be acting responsibly for the sake of wider society, even as things start to go back to normal across Australia.

MANAGING THE COVID-19 CRISIS



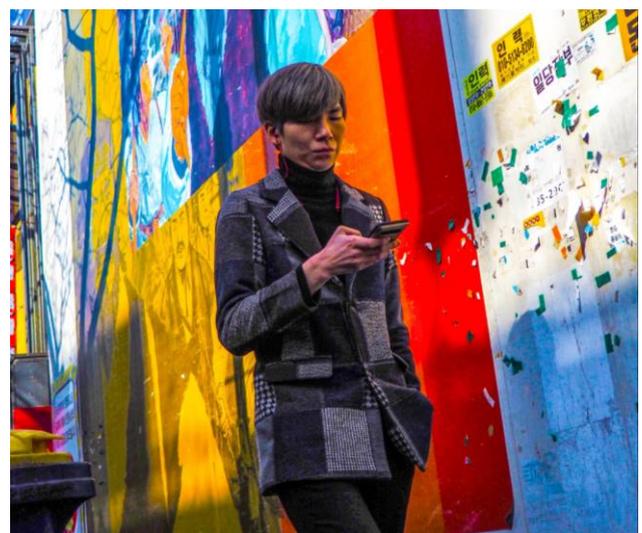
SOUTH KOREA

South Korea experienced an outbreak of COVID-19 relatively early, with cases peaking in mid-March and declining thereafter. By 26 May, a little over 11,000 confirmed infections and around 260 deaths had been reported in the country. Unlike other nations, where restrictions came in gradually and it took time to organise a response, the South Korean government acted quickly and decisively to stem the spread of the virus through a world-class testing and tracing regime and strict quarantine measures. The resources to test everyone (even those not showing symptoms) and a contact-tracing app called Corona 100m meant that infected individuals could be identified, and the disease could be kept under control. Thanks to these efforts, South Korea has thus far avoided imposing a nationwide lockdown.

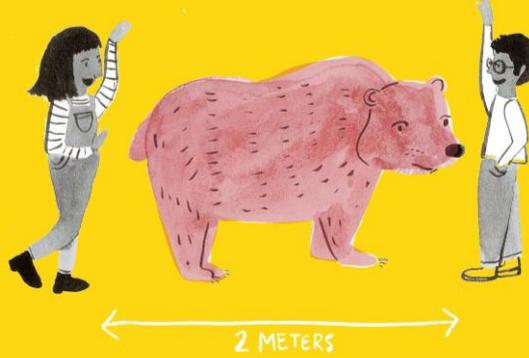
First-hand experience of the SARS epidemic in 2002/3 clearly influenced this outcome as the public's awareness of the dangers they faced made them more willing to comply with the authorities and hygiene measures. For South Koreans, wearing a mask and accepting restrictions to civil liberties in exchange for public health benefits were not the unfamiliar, disconcerting concepts they may have appeared elsewhere to those without vivid memories of past epidemics. Cultural factors are likely to have played a role too, with some commentators tying South Koreans' sense of unity and trust in their government back to collectivist ideals rooted in the teaching of Confucius (551 BC to 479 BC). Whether as a result of national psyche or evidence of an effective response from the authorities, trust in the government does seem to have led many South Koreans to follow the official health and safety guidelines and download and use the contact tracing app.

Adoption of the contact tracing app also reflects a broader trend: the prevalence of cutting-edge technology and digital services in South Korea. For example, 95% of South Koreans owned a mobile phone in 2019, and there was already a strong culture of takeaway food (and delivery/on-demand services more broadly) prior to lockdown. The fact that this infrastructure was in place before the pandemic is likely to have helped many companies to continue serving customers throughout this period.

This general willingness to comply and a pre-existing familiarity with such measures, paired with the advanced technological resources, mean that local hotel brands like [Lotte](#) are able to smoothly implement very thorough and sophisticated measures such as the use of face masks at all times, contactless temperature checks, constant disinfection and fumigation of surfaces, designating different routes for staff and guests, and sealing off doors to rooms that have been sanitised.



MANAGING THE COVID-19 CRISIS

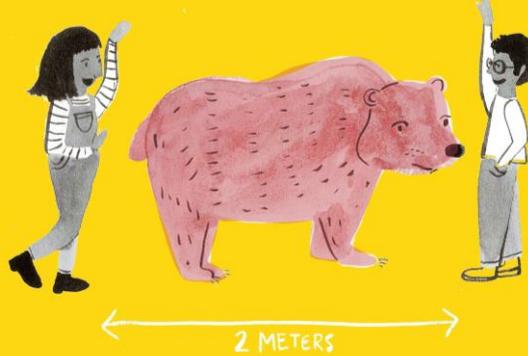


Takeaway for service-sector companies

- Swift and decisive action from the South Korean authorities has spared citizens from the worst ravages of the pandemic seen elsewhere. While it may be necessary in other countries for companies to reassure customers by emphasising the hygiene measures adopted to keep them safe, this message may not need the same degree of prominence in South Korea.
- The South Korean experience suggests that citizens are likely to comply with measures that they deem to be necessary and proportional and trust that those setting the rules have their best interests in mind. As such, politely setting out rules on hygiene and social distancing may be sufficient.



MANAGING THE COVID-19 CRISIS



CANADA

COVID-19 reached Canada in early March and case numbers increased rapidly from early April. The country's prime minister, Justin Trudeau, advised Canadians to stay at home where possible, to stay 2 metres apart from others at all times and to adopt further hygiene measures such as handwashing and disinfecting surfaces more frequently than normal. Sponsored by GOJO, the inventors of Purell, the [Canadian Patient Safety Institute](#) started a pledge and hashtag "#STOPCleanYourHands" to spread the important messages of personal hygiene in a collaborative effort to "flatten the curve".



Although police have been empowered to issue fines to those found to be breaking the law, overall, Canadians appear to have been willing to comply with the rules set by national and local authorities. By the end of April, the country was ready to embark on a staggered reopening, with the pace of change varying from region to region based on local rates of infection. The general compliance from the public suggests a level of trust in the government and an underlying sense of national unity, which may have been heightened by the pandemic. In a recent study by the consultancy firm Anstice, 38% of respondents reported that the pandemic had made them more inclined to help others and many suggested that they planned to prioritise meaning over materialism in future. We can already see this notion being leveraged by one of the nation's leading fast food restaurant chains, Tim Hortons, at every level of their [brand communications](#).

Takeaway for service-sector companies

- Consumers choosing to prioritise meaning over materialism provides brands with an opportunity to connect with target customers on the basis of shared values. Companies operating in the region should draw on this powerful connection, not only to encourage compliance with hygiene measures but also to enhance a sense of guest safety and experience as a priority at this time.
- It could also be interesting for companies to explore partnerships with important local hygiene brands that have a good brand ethos and are seen to be making a meaningful impact, rather than taking advantage of the situation to increase sales.

Proudly serving our communities

The health and well-being of our team members and guests is our first priority.

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Here to Serve our Truck Drivers

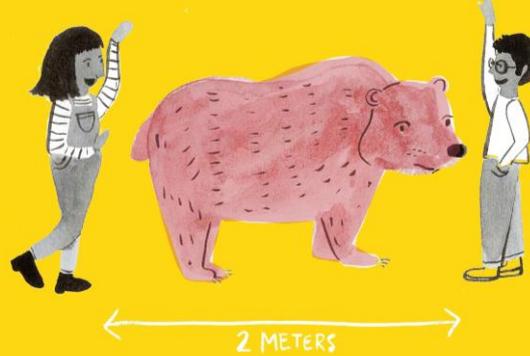
We're moving quickly to be accessible to truck drivers across Canada during this crisis.

- 2000+ locations now offer take-out and washroom access.
- Many restaurants now allow drivers to order on the app and pick up at the door.
- By Friday, our 400+ highway locations will offer washroom access and front counter service for truck drivers.

Thank you for your service, and for keeping our country going.

Tim Hortons

MANAGING THE COVID-19 CRISIS



As we have seen, messages of national unity and collective responsibility proved to be effective in a range of countries. While highly diverse, these countries broadly share a certain degree of trust in the government and a sense of solidarity with other members of society. However, similar messages were less successful in Nigeria, Colombia and South Africa.

COLOMBIA

The Colombian authorities declared a public health emergency in relation to the COVID-19 pandemic on 24 March. The measures introduced include asking people to stay at home as much as possible and to wear a mask in enclosed public spaces such as supermarkets and public transport. Schools and universities have been closed, although online learning continues in some instances. To date, the country has diagnosed just over 23,000 cases of the virus and seen 776 deaths. As noted in Nigeria, the evidence suggests that most people have tended to comply with the guidance if they are able to, but the sheer size of the informal economy means that many have no choice but to go out to work.

Like countries such as Italy and Nigeria, Colombia also has a very tactile, family-oriented culture with strong traditions of meeting regularly to spend time with extended family and friends. On this point, it could be argued that the government's messaging, which tried to focus on the potential benefits of staying at home to spend quality time together as a family, failed to connect with the realities of people's daily lives and concerns.

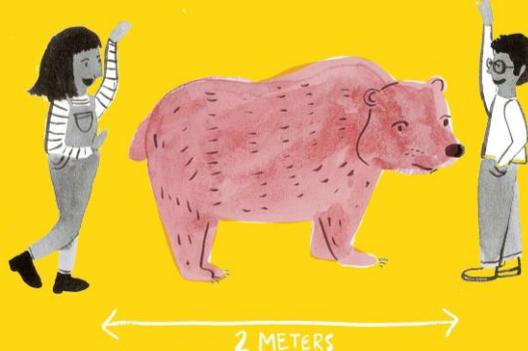
As can be seen in the latest communications from Hotel Dann Cartagena, messages about following good hygiene measures are built into stronger narratives of hope that, with the help of individual actions, this will all pass very soon so that family and friends will be able to come together again and enjoy life as normal.

Takeaway for service-sector companies

- As ever, it is important to understand your target customer and connect with them in a meaningful way that reflects their lived experience.
- One potential starting point for brand messaging in Colombia is the idea that complying with health and hygiene messages now will help the country and individuals return to their normal routines (such as going out to work in the informal economy or spending time with loved ones) as soon as possible.



MANAGING THE COVID-19 CRISIS



NIGERIA

On 27 February, Nigeria became the first country in sub-Saharan Africa to report a case of COVID-19. Since then, only 8,344 cases and 249 deaths had been confirmed by the WHO as of 27 May. The government has stopped short of a national lockdown, choosing instead to set policy on a state-by-state basis. Residents of severely affected states such as Lagos, Ogun and the Federal Capital Territory of Abuja have had their movements curtailed and both international and interstate travel has been restricted.

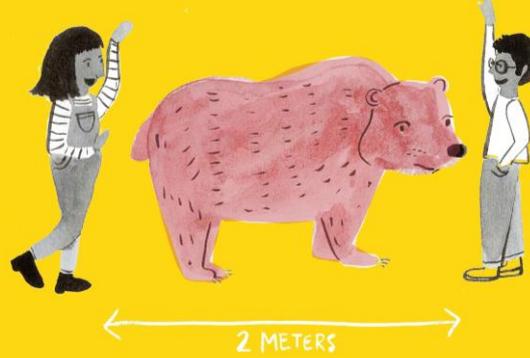
As in many developing nations, it has been a challenge to enforce social distancing on those working in the informal economy who do not have a social safety net to fall back on and therefore need to go out to work. This challenge has been compounded by a lack of PPE and other issues facing the country, including a looming recession due to the collapse in oil prices and an outbreak of Lassa fever.

In a country with a strong communal and tactile culture, regular social interactions and celebrations in large groups are a core part of local life in Nigeria. These habits of a lifetime are hard to break despite the threat posed by the coronavirus and many feel that the advice of the government, especially when focusing on hand washing and social distancing has completely overlooked the reality of daily life for many in the country, for whom the nature of their work, and their access to resources does not allow for them to physically comply with these measures. Moreover, after a long history of public corruption in Nigeria, there also appears to be a lack of trust that the government understands and acts in the best interests of the majority of the people despite its effective response to the Ebola epidemic in 2014.



There is a certain level of disconnect with governmental bodies for many in Nigeria and the role of more targeted communications through local community leaders, organisations and even social media is proving key in truly engaging the masses in taking measures against a virus that many originally had felt was not an immediate problem for them. For instance, Guinness Nigeria has rolled out messages on its social media around 3 key topics: supporting local bars through this uncertain time with their [#raisethebar](#) campaign, raising awareness of [hygiene, tips and facts](#) about the virus, as well as tips for responsible [hosting of online celebrations](#) to temporarily replace [ówàmbè](#) culture.

MANAGING THE COVID-19 CRISIS



Takeaway for service-sector companies

- Messaging focused on the needs and experiences of the individual and their local community are likely to work better than a blanket approach in Nigeria. For example, brands could use focus groups from different regions to pinpoint issues that would resonate with local people.
- For consumers at the lower end of the socioeconomic scale, who feel that the virus is less of an immediate threat to them, brands will need to present a compelling argument explaining why compliance with social distancing and/or hygiene measures will have immediate and worthwhile benefits for the target customer and their families.



Useful Tips



Regular and thorough hand-washing with soap and water (**minimum of 20 seconds**) or use alcohol-based hand sanitizer (**minimum 60% alcohol**)

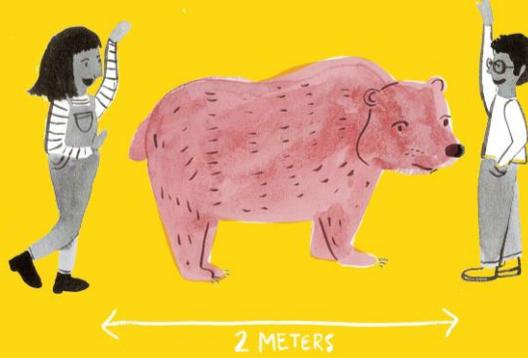


Useful Tips



Covering mouth and nose with disposable tissues (or into your sleeve) when coughing and/or sneezing

MANAGING THE COVID-19 CRISIS

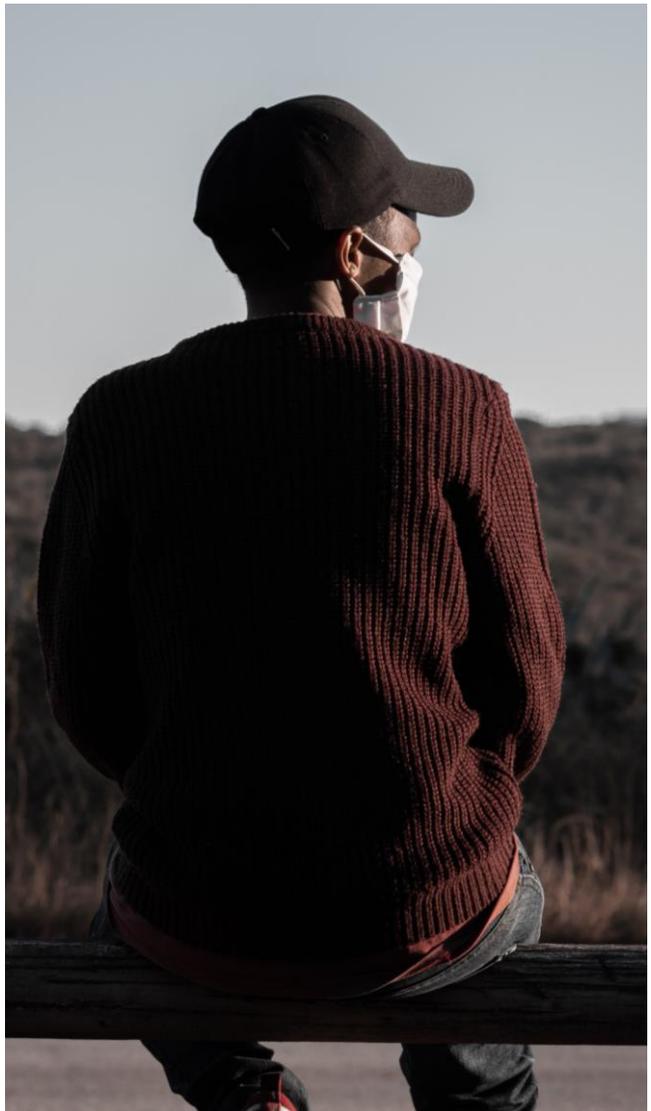


SOUTH AFRICA

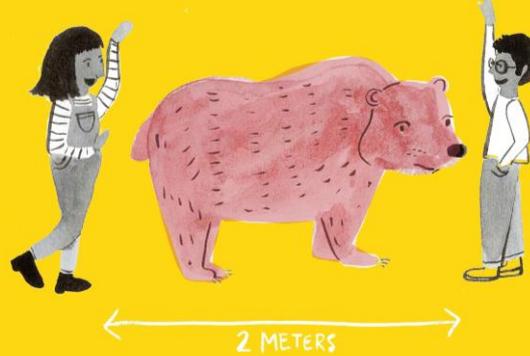
Like in many other countries, a whole scale of lockdown levels have been implemented in South Africa, throughout which the country has seen a range of different measures including beaches and schools being closed, restaurants limited to serving takeaway food only, and masks being compulsory in stores.

The country has recorded just over 24,000 cases and 524 deaths to date. While the majority of South Africans have abided by the rules introduced by the government of Cyril Ramaphosa, there have been instances of non-compliance from both ends of the social spectrum: South Africans oppose lockdowns on the grounds that they are an infringement of civil liberties (typically those at the higher end of the socioeconomic spectrum), whereas those at the lower end of the socioeconomic spectrum find social distancing and stay-at-home orders hard to follow because of factors such as cramped living conditions and a daily wage system.

Like many other countries, South Africa has a particularly tactile culture and life events (most notably weddings and funerals) would typically bring together large numbers of people. This represents another hurdle to overcome for those struggling to get used to staying apart.



ADVICE RATHER THAN ORDERS



While some governments decided to enforce measures to control COVID-19 through penalties such as fines and even jail time, others opted for a more relaxed approach. In these nations, governments issued guidance to citizens and then relied on individuals to modify their behaviour accordingly. As we will see, this worked well in Sweden but created challenges in Japan.

SWEDEN

In Sweden, the government advised individuals to stay at home, work from home where possible and avoid gatherings and unnecessary travel. Restaurants, cafes and other venues have been allowed to remain open provided that it is possible for patrons to remain physically distant from one another whilst on the premises. Many observers have been watching closely to see how this policy would affect Sweden's coronavirus trajectory. At the time of writing in late May, Sweden had a little over 35,000 coronavirus cases and 4,220 deaths. This represents a heavier death toll than Sweden's Scandinavian neighbours (Denmark, Norway and Finland), although the country has still fared better than many that have introduced more draconian measures.

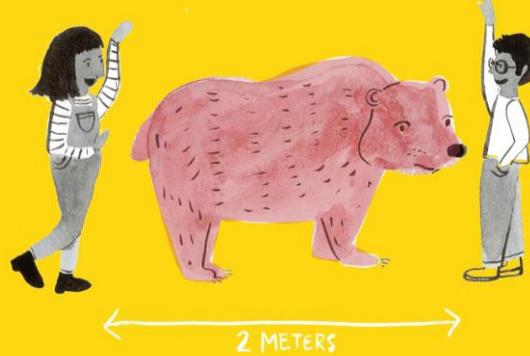
Many of the reasons why this approach has proven more effective in Sweden than it would have been elsewhere come down to culture and a strong sense of duty to society. This is reflected in other ways, too, such as the fact that very few Swedes avoid paying taxes despite the high rates imposed. Key concepts in this regard include "folkvett", or the idea that individuals should do the right thing without being told, and what is known as "Jantelagen" whereby individuals face societal shame for acting as if they are better than others or as if the rules do not apply to them. While it is yet to be seen whether this approach will keep Sweden's death rate under control in the long term, the fact that Swedish people have abided by the laws as they stand is telling.



Takeaway for service-sector companies

- The Swedish approach is built around offering individuals guidance on which to base their behaviour. As such, companies should be mindful not to come across as imposing a set of rules, since this could be quite jarring for the reader.
- The government's decision to opt for guidance rather than rules does not mean that anything goes. Companies still have a duty of care to their customers and this requires them to consider the hygiene and social distancing measures they will use to keep members of the public safe. In doing so, the company is showing that it is prepared to put safety ahead of profit.

ADVICE RATHER THAN ORDERS



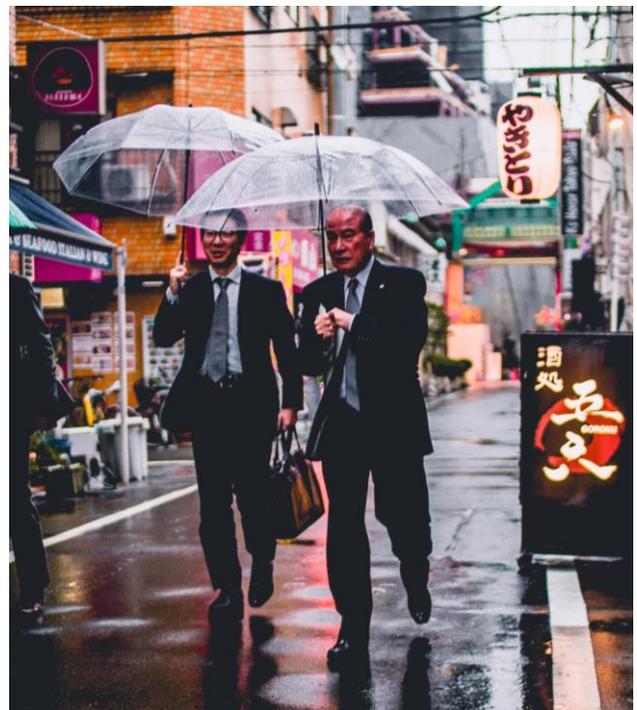
JAPAN

The Japanese approach to COVID-19 relied on advising citizens to avoid the three Cs: closed spaces with poor ventilation, crowded places full of lots of people and close-contact settings. Companies were also encouraged to allow their employees to work from home where possible. Having reported its first death from the virus on 14 February, the current infection total stands at 16,623 and 846 people are known to have died. While the death toll is lower than that of Sweden, it appears that this mainly comes down to a natural tendency to use masks and follow good hygiene practices, rather than a result of the government's guidance approach that doesn't seem to have resonated as well with Japanese citizens.

This may be linked to certain elements of Japanese office culture, which is famed for encouraging long hours and rewarding company loyalty. As such, working from home for health reasons could be perceived as a lack of commitment to your company. Similarly, there has been a reluctance on the part of employers to set up remote working systems or relax the requirements for physical copies of documents bearing physical signatures and stamps, due to a high degree of respect for longer standing traditions, processes and rules. In this instance, the lack of clear rules from the central government meant that there was little incentive for companies to disrupt their tried-and-tested routines, despite the public health threat.

One of the region's biggest hotel brands, Hoshino Resorts have also picked up on the three Cs previously presented by the government as they lay out a whole host of safety measures that are to be taken at their hotels during this reopening phase.

These new measures comprise of regular temperature checks, questioning of guests' travel history and ongoing monitoring of health to decide which facilities can be used, as well as strict distancing measures in the restaurants and requirements to use hand sanitiser upon arrival at different hotel facilities.



Takeaway for service-sector companies

- To ensure public safety in Japan, it may be necessary to (politely) present hygiene measures, from wearing masks to hand washing advice, as rules rather than guidance. This clears up any ambiguity and means that the onus is on the company, rather than the individual, to instigate the behavioural change.



CONCLUSION

Governments, companies and private citizens are all in uncharted territory as a result of the COVID-19 pandemic, and companies in the service and hospitality sector have been particularly hard hit. As the lockdown measures start to ease and societies work to define a new normal, brands will need to adapt their products and services and tailor their messaging to reflect this reality. The reaction to the approach taken by central governments in various countries suggests that the message itself is not all that counts: the same concepts may elicit contrasting responses as a result of historical, socio-economic and cultural factors. To have the desired impact, all of these elements must be taken into account. For companies considering how they will do business in the post-lockdown world, the key will be to understand what the target customer has experienced in recent months and to try to, not only meet, but also continue to anticipate, their needs accordingly.



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