

OCTOBER 2020

the alternatives
marketing at work
covid **pulse survey**



Alter
your trajectory





welcome



Sandra Lawler
Founder Director
Alternatives Group

The second **Alternatives Marketing at Work Covid Pulse Survey** was carried out between September 17th-28th 2020 and was completed by 295 people in the marketing community in Ireland, at all career levels, across sectors and from both small and large companies.

We felt it would be useful to track and share how the current pandemic is impacting on you and your business. To understand if and how it is impacting your employment, remuneration and role focus. To explore how you are dealing with working remotely, with all its positives and negatives. And most importantly of all, how you are coping with it personally.

We hope you find it of interest. If you would like to explore any issues in more detail, please get in touch. The best start point, as we too are working remotely, is to email us at hello@alternatives.ie and we will take it from there.

From everyone in the Alternatives team, stay safe and well.

about Alternatives

Alternatives is Ireland's leading marketing talent business. Alternatives has created a flexible Panel of personally vetted, strategic, marketing and digital professionals, available on a flexible, remote and full-time basis, with the skills businesses need now to adapt and thrive.

www.alternatives.ie



key highlights

On business impact

- **The negative impact of Covid on businesses remains significant**, but the position has somewhat improved since April. 20% have even seen a positive impact of Covid on their business.
- **Brexit** is a significant issue and back up the agenda again.

On Jobs and Salaries

- **Jobs and conditions have been impacted.** 1 in 4 people have had their employment impacted. Small companies and sectors such as hotel and tourism and agencies are particularly impacted.
- **40% of respondents have had salary cuts.** 53% have had no change in salary or bonuses at this point.
- **Marketing employment opportunities are reduced**, but are better than in April.
- 74% of respondents said the focus of their **marketing role has changed**.
- **Marketing budgets** have been cut for over half of all respondents.

On working from home

- **Working from Home is working in general** for people both personally and for their role. 59% feel they are **more productive** working at home.
- Overwhelmingly, irrespective of seniority or gender, they do not wish to stay working full-time from home forever and see a hybrid model, with a mix of home and workplace, as the ideal.
- 68% of respondents will continue to **work from home this quarter**. Only 16% anticipate a return to the workplace by January and only 40% by spring 2021.

On personal impact

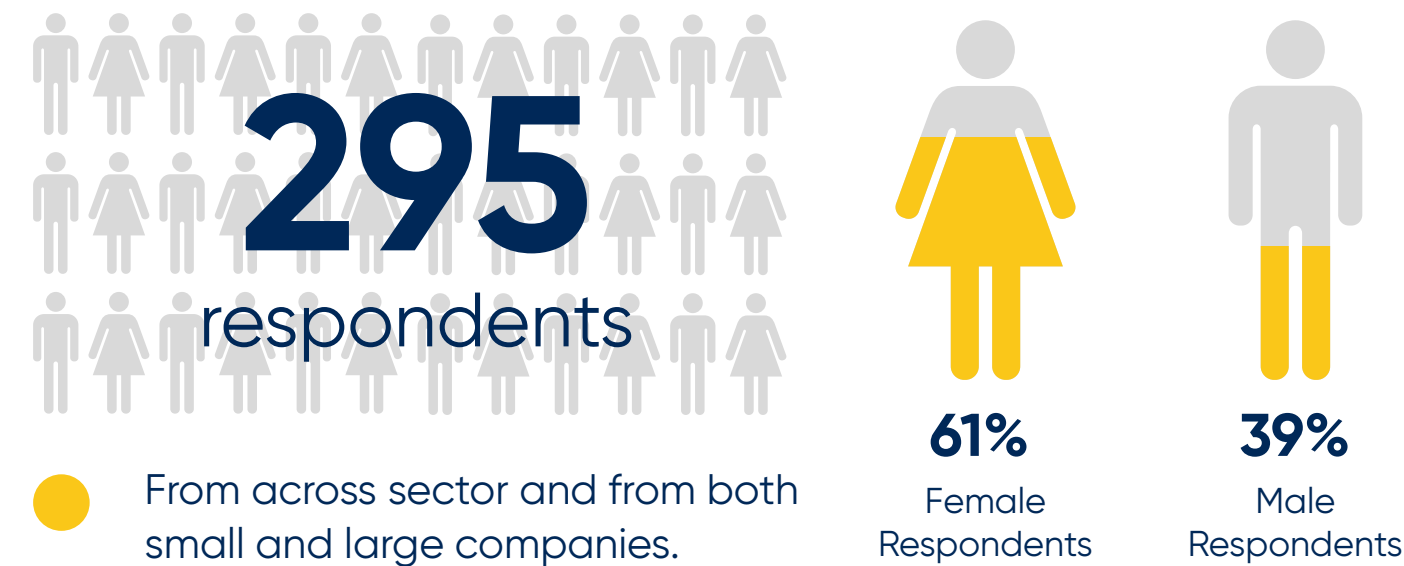
- **Covid has had a deep personal impact**, although most are coping ok, rating their coping score as 6.7 out of 10.
- **But there are concerns** to manage going into autumn, in particular the impact of the lack of interaction, as well as increased workload and increased personal stress.
- There are however **some positive impacts of this pandemic**– especially no commuting and a better work life balance.

1. profile of respondents

The second **Alternatives Marketing at Work Covid Pulse Survey** was carried out from September 17th–28th 2020. It was completed by 295 people in the marketing community in Ireland.

It was designed to see how the current pandemic is impacting on the businesses of the community, and how it is impacting on them personally, both positively and negatively.

Snapshot

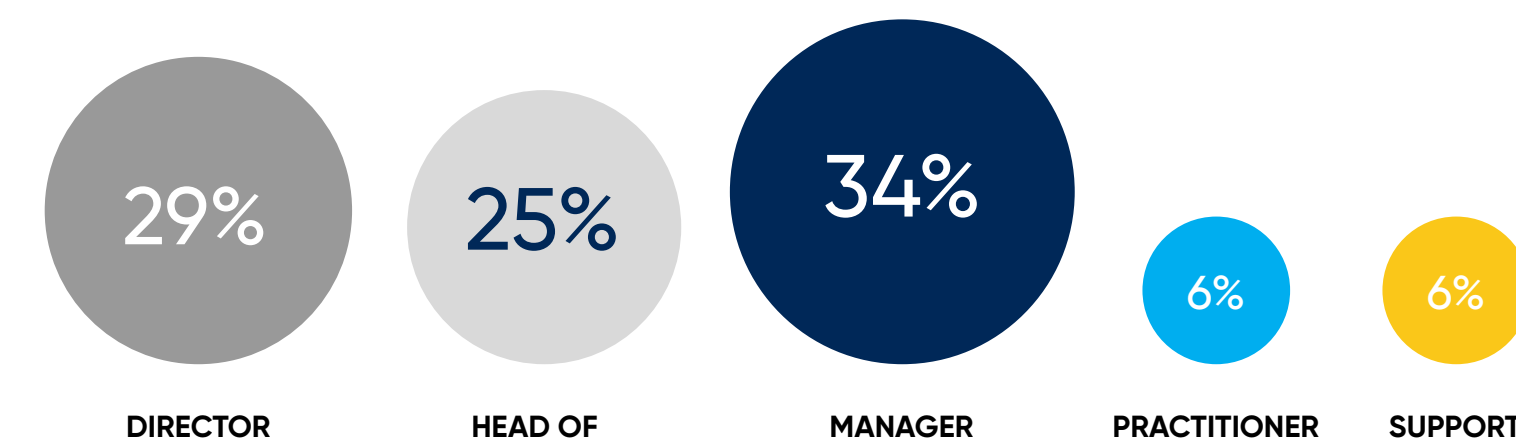


Company size

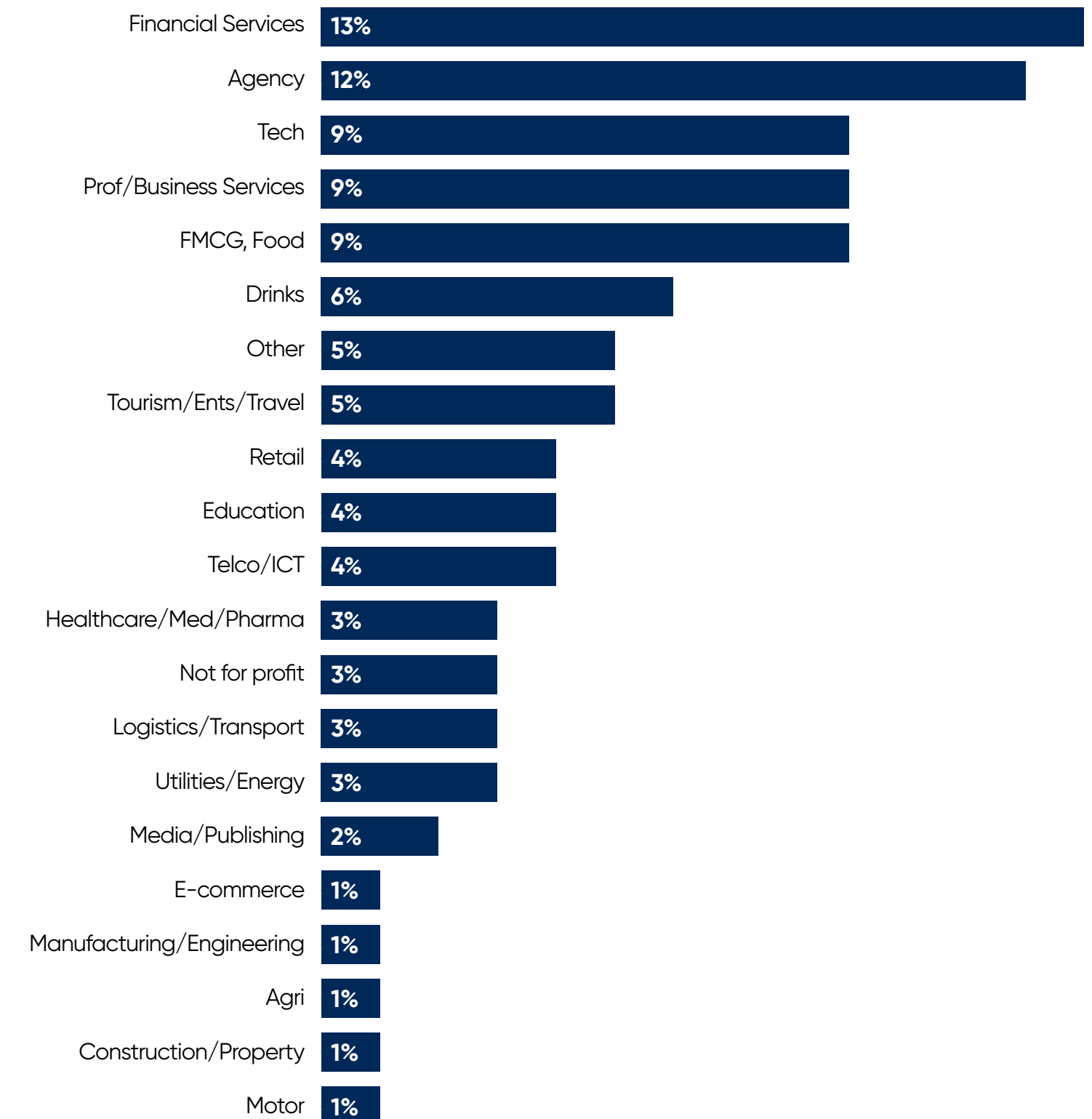


Respondents by level

12% are at relatively early career stage, 34% at mid management level and 54% at head of function or director level.



Respondents by sector



2. impact on business

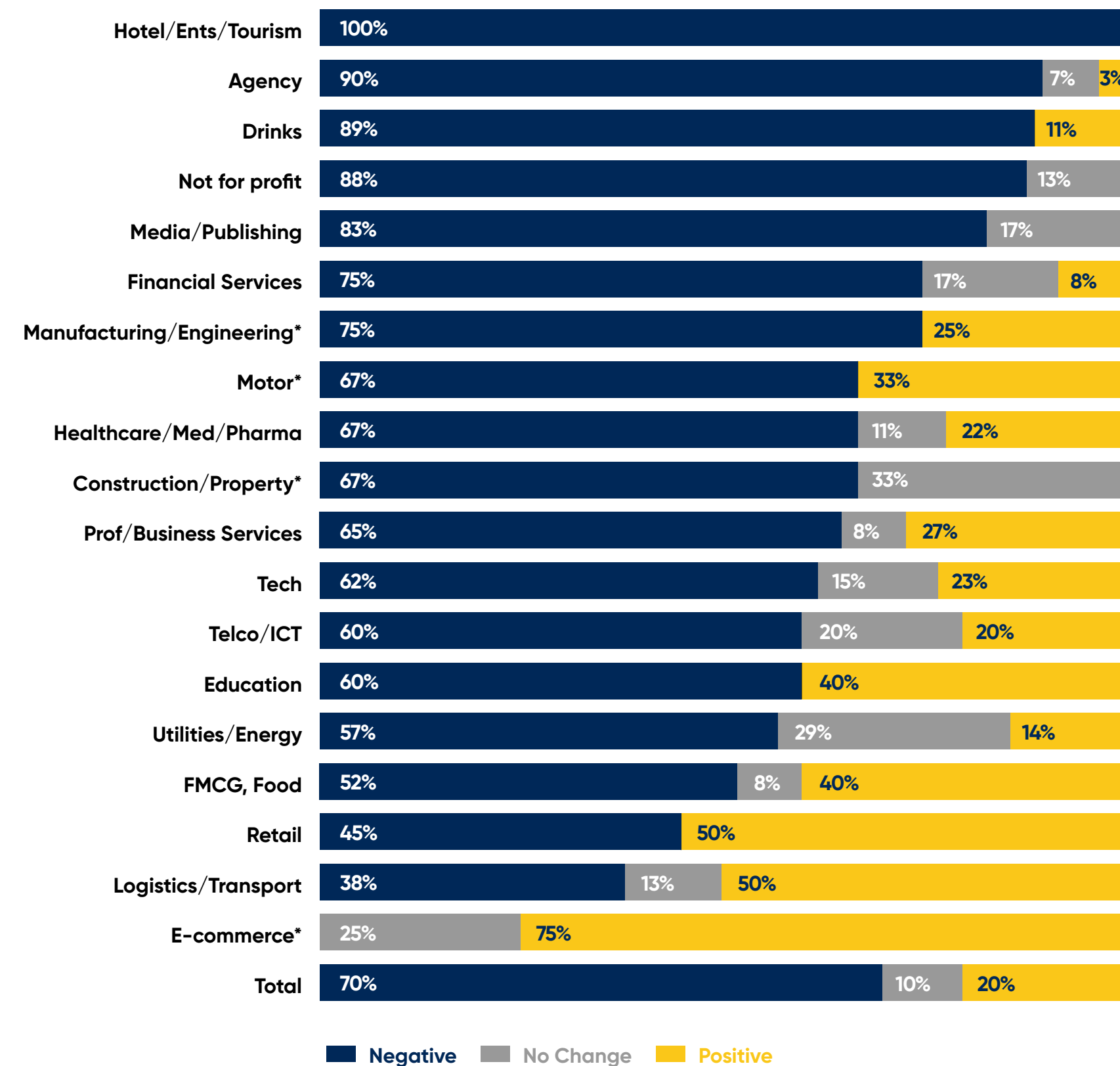
The impact of the crisis remains significant, with 70% of respondents rating it as having had a negative or very negative impact on current business performance.

However, this is a somewhat improved position vs the survey in April, when a corresponding 81% said it had impacted negatively. Sectors that are most negatively impacted include tourism, which is unchanged at 100% of all tourism respondents, agencies, drinks and not for profit.

In addition, 30% of small businesses of less than 50 employees have been very negatively impacted vs 19% of larger companies. However this also signals an improvement compared to April when it was 42% vs 36% respectively.

1 in 5 respondents have seen some or significant positive impact of Covid on their business vs only 12% in April. Most positive sectors include e-commerce, retail, logistics, education and FMCG. The motor industry has an improved outlook since April.

Impact on your organisation's current business performance- ranked by most negative impact



*Sample size for these sectors is small

▼ Sectors most negatively impacted (vs average)

	Sept 2020 %	April 2020 %
Hotel/Ents/Tourism	100	100
Agency	90	93
Drinks	89	94
Not for profit	88	77
Media/Publishing	83	78
Financial Services	75	94
Manufacturing/Engineering	75	100
Average negatively impacted	69	81

▲ Sectors most positively impacted (vs average)

	Sept 2020 %	April 2020 %
E-commerce	75	20
Retail	55	25
Logistics/Transport	50	14
Education	40	20
FMCG, Food	40	33
Motor	33	0
Prof/Business Services	27	3
Average positively impacted	20	12

2. impact on business cont.

Future, longer term impact of coronavirus on the organisation

The future outlook remains negative (61% of respondents), but somewhat less so than in April (73%). In the chart opposite we highlight sectors in order of perceived future negative impact. Sectors such as tourism, media, agencies and not for profit are now even more pessimistic about the longer-term business impact of Covid.

12% of respondents from small businesses feel there will be a very negative longer-term impact on their organisation vs 5% of large organisations.

But it is not all negative. 25% see a positive future impact compared to just 17% in April. Those in e-commerce, healthcare, tech, retail and professional services in particular have a more positive future outlook than they did then.

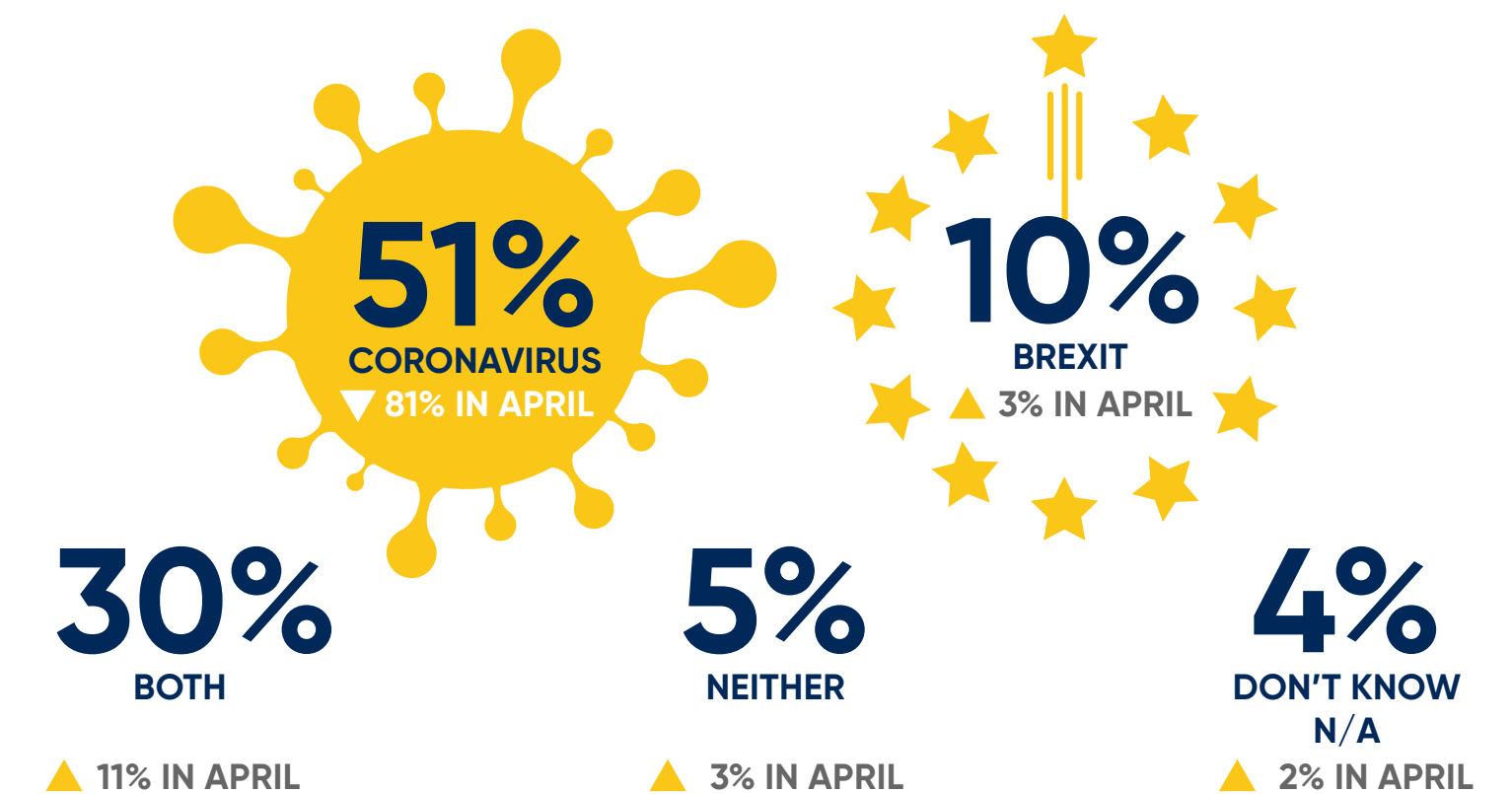
View, by sector, of future impact on their organisation

	Negative	No change	Positive	Don't know/ N/A
Hotel/Leisure/Ents	100%	0%	0%	0%
Media/Publishing	100%	0%	0%	0%
Agency	90%	10%	0%	0%
Not for profit	88%	0%	13%	0%
Drinks	83%	6%	11%	0%
Utilities/Energy	71%	14%	14%	0%
FMCG, Food	68%	4%	24%	4%
Construction/Property	67%	0%	33%	0%
Motor	67%	0%	33%	0%
Financial Services	56%	6%	31%	8%
Retail	55%	0%	45%	0%
Prof/Business Services	54%	4%	35%	8%
Logistics/Transport	50%	25%	25%	0%
Healthcare/Medical/Pharma	44%	11%	33%	11%
Education	40%	20%	30%	10%
Tech	31%	15%	46%	8%
Telco/ICT	30%	40%	30%	0%
Manufacturing/Engineering	25%	0%	50%	25%
E-commerce	25%	0%	75%	0%
Total Sept	61%	10%	25%	4%
Total April	73%	6%	17%	4%

Brexit or Coronavirus a bigger issue for your business

Although Covid remains the key threat, Brexit is a significant issue and back up the agenda again. 40% say it is as big or a bigger issue than Covid and in particular for those in the FMCG, agri, logistics, professional/ business services and financial services sectors.

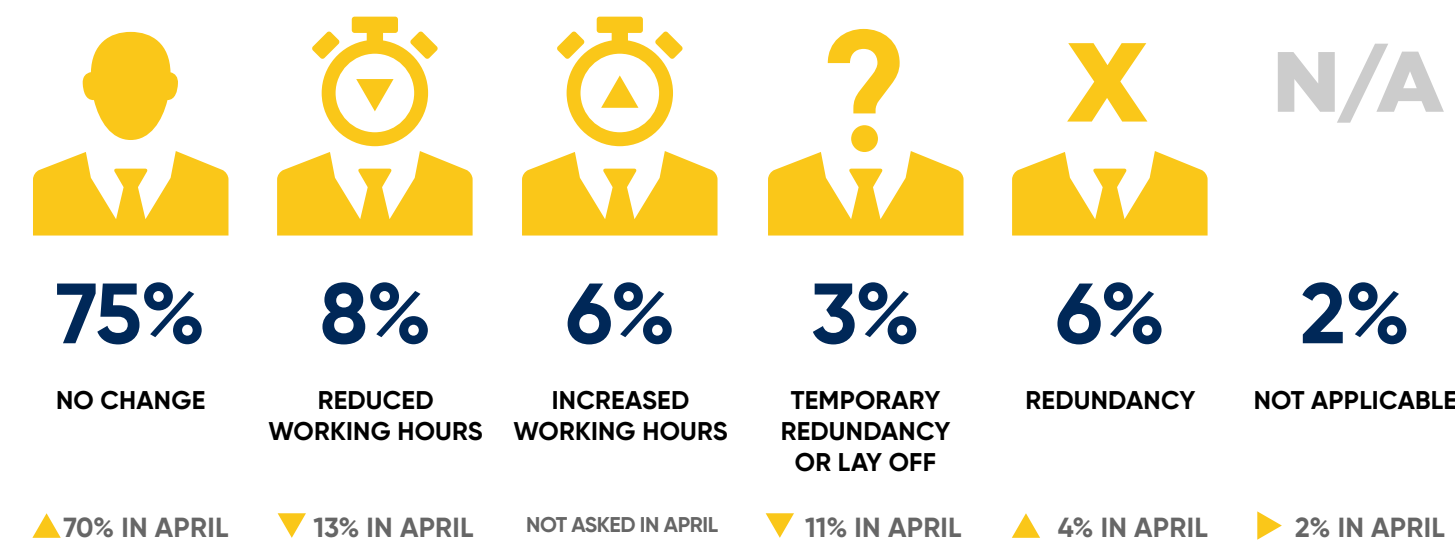
Sectors such as tourism, agencies, education, not for profit, drinks, healthcare and tech feel relatively more impacted by Covid than Brexit.



3. impact on employment status, salary and security

We looked at the immediate impact of the crisis on employment status, remuneration and job security within the marketing community.

Impact of coronavirus on your current employment status



75% of respondents have had no change to their current **employment status**. In larger companies, 84% of those have had no change to their status and conditions, compared to 65% of those in small companies.

Many of those who were on temporary layoffs (11%) have returned to work, but sadly, some have been made redundant (6% of total respondents vs 4% in April). 8% are working reduced hours but 6% are contracted to work more hours.

Those working in small companies are significantly more likely to have been made redundant or laid off on a temporary basis- 15% of those in small companies vs 4% in large.

Director level respondents are most likely to have had their employment status changed. One in four have working hours reduced, have been temporarily laid off or made redundant.

For those at practitioner level (5-9 years into their career) it is an all or nothing scenario. They are most likely not to have had any cuts at all (89% vs average of 75%) or conversely most likely of all groups to be made redundant (11% vs average of 6%).

Hotel and tourism sectors continue to be the hardest hit. 17% of respondents in this sector have been made redundant, 8% are on temporary layoff and a third are on reduced hours.

Agencies have also been badly hit. 11% of agency respondents have been made permanently redundant, 7% are on temporary layoff and 15% are working reduced hours. Those in media & publishing, construction, healthcare and drinks have also been more impacted than the average.

Those in the telco/ICT, utilities, education, FMCG, tech and financial services and professional services sectors have fared relatively better.

	No change	Reduced hours	Increase in contracted hours	Temporary layoff	Redundancy
Support	71%	14%	7%	0%	7%
Practitioner	89%	0%	0%	0%	11%
Manager	75%	6%	6%	2%	7%
Head of	84%	5%	6%	3%	2%
Director	65%	14%	7%	5%	6%
Total	75%	8%	6%	3%	6%

3. impact on employment status, salary and security cont.

We looked at the immediate impact of the crisis on employment status, remuneration and job security within the marketing community.

Salary impacted due to coronavirus

40% of respondents have had a reduction to their salary or other financial remuneration. Of these 29% had a reduction of less than 10%, 30% a reduction of between 11-20% and 41% have had salary reduced by more than 21%. **53%** have had no change in salary or bonuses at this point.

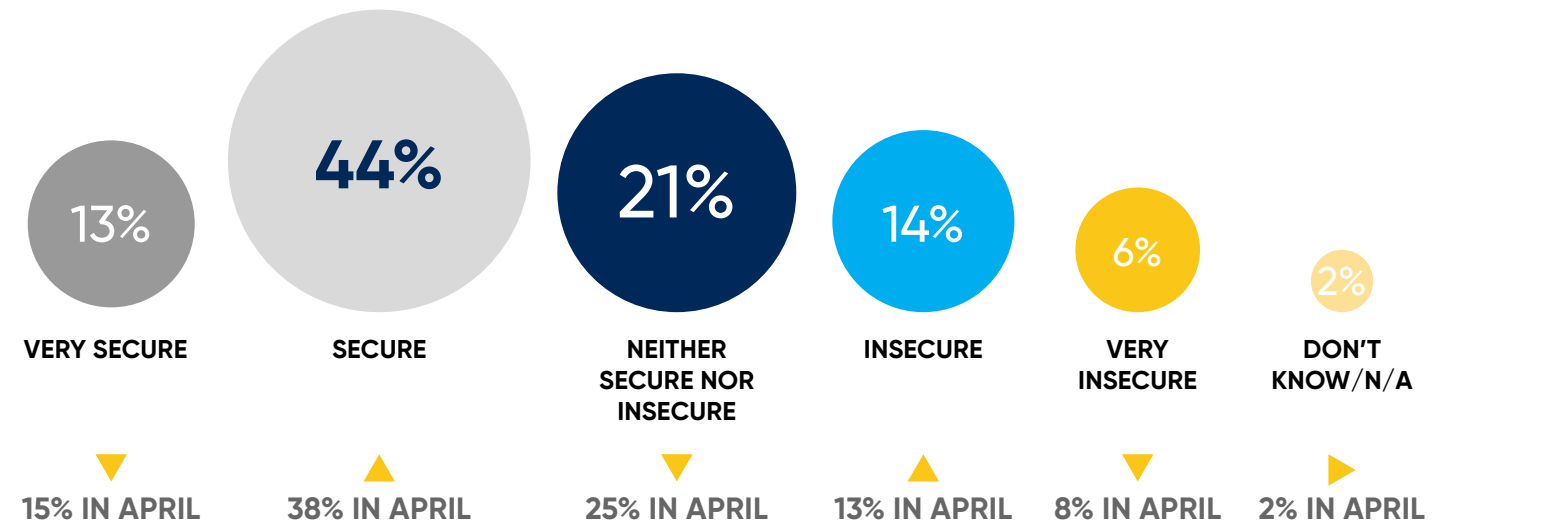
Salary reduction	15%
Salary reduction plus bonus/other remuneration reduction	9%
No salary change but bonus/other remuneration reduction	16%
Salary has increased	4%
No change	53%
N/A	3%

In terms of sectors, the greatest hit to salaries have been in agencies where 59% have had salary cuts, hotels/ tourism/ents (54%), media & publishing (50%), drinks (39%) and not for profit (38%).

Those working in tech, telco/ICT, financial services, utilities, FMCG, retail and professional services are much less impacted than average.

Those working in **small companies** have been much more impacted by salary and other financial remuneration cuts. Half have had their package reduced and a third have had salary cuts, often very deep. By contrast 25% of those working in large companies have had package cuts and 11% salary cuts.

Level of security in current role



There is a sense of a little more job security now than in April (57% vs 53%). However, levels are significantly lower than recorded in our 2019 annual Salary & Sentiment survey of 1,000 respondents, where 71% felt secure or very secure in their roles.

Those working in small companies feel more insecure-24% vs 17% of those in larger companies- and are more likely than others to feel very insecure.

Those working in education, retail, telco/ICT, manufacturing, healthcare, financial services and FMCG, have a higher than average sense of job security currently. Those least secure at this point are from the construction/property, media & publishing, agencies, utilities and drinks sectors.

Salary changes by level of seniority

In terms of cuts, those at Director level are most likely to have been impacted, those at junior level least so. The levels of salary cuts were also greatest at director level. Half of those who had a salary reduction, were cut by 21% or more.

Career level	No change	Salary Cut	Salary cut plus other financial	No salary cut but other financial cut	Salary Increase	Increase	N/A
Support	64%	7%	0%	14%	0%	7%	7%
Practitioner	56%	0%	0%	33%	6%	0%	8%
Manager	57%	15%	7%	15%	6%	1%	8%
Head of function	57%	14%	6%	17%	6%	0%	0%
Director	43%	21%	16%	15%	2%	1%	1%
Total	53%	15%	9%	16%	4%	1%	4%

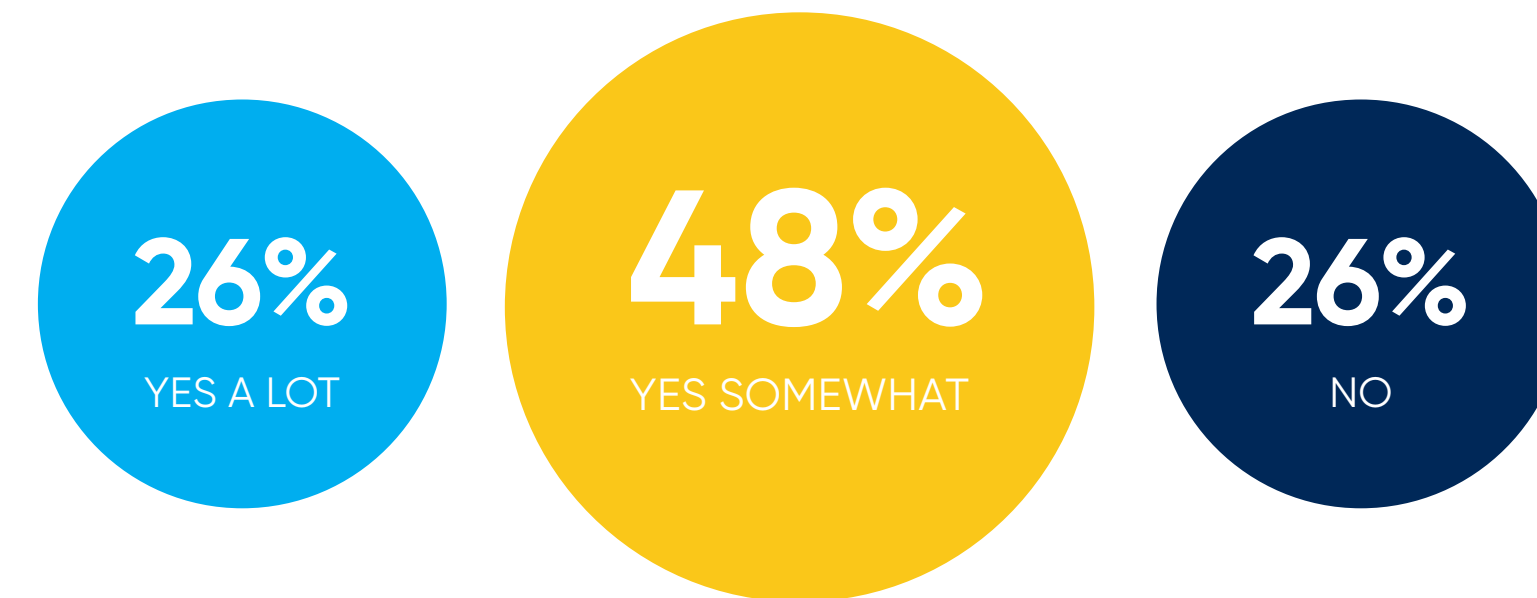


4. marketing role focus

We explore the focus of the marketing role now and how it has evolved since the early days of the crisis.

If focus of role changed during this crisis

74% of respondents said their role has changed somewhat or a lot as a result of the crisis, in particular those at head of and director level.



Top areas of focus currently

In April, following the immediate impact of Covid, marketers were immediately focused on strategy adaptation and stakeholder communications—in particular digital and internal comms and client management. Now six months later, we see a continued focus on strategy and digital comms, and more on better consumer/customer data & insights and on greater demand/lead generation.

Mid- to managerial levels are more focused on digital communications, strategy and on consumer insight. 82% of those at director level are now focused on reshaping strategy and on the driving the commercial agenda—managing customers, generating new business and on sales.

Large companies are currently relatively more focused on ATL comms, consumer insight, data analytics, loyalty and strategy. Small companies are more focused on sales, customer management and lead generation.

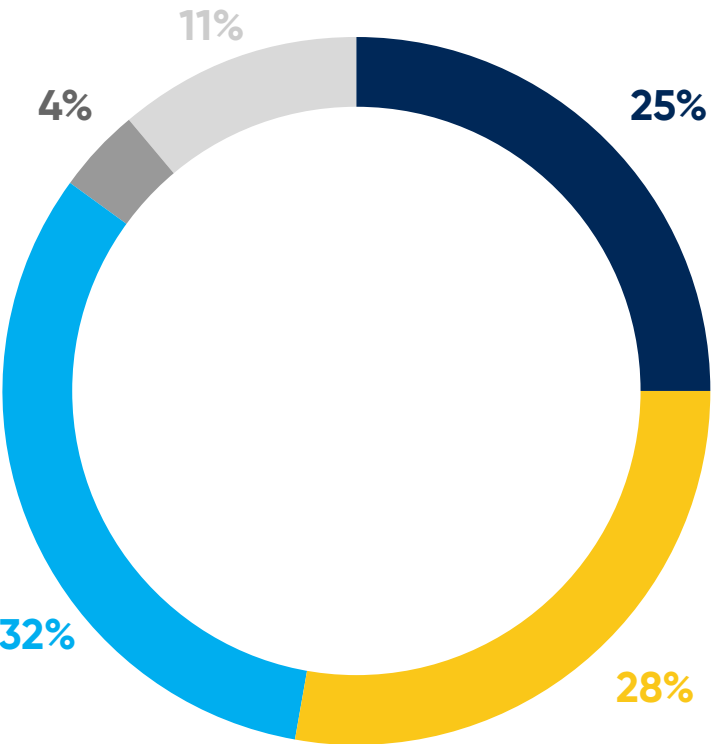
Top areas of focus currently



5. marketing resources

We explore how the marketing function’s most important resources- its people and its budgets- have been impacted.

Marketing budget



Budget cut by more than 21%
Budget cut by 1-20%
Budget not cut
Don't know
N/A

Marketing budgets have been cut for over half of all respondents. Sectors who have reduced budgets most include the drinks, hotel, tourism & travel, FMCG/food, motor, media & publishing sectors.

Marketing employment opportunities

Type of opportunity	Hiring	On Hold	Don't know
Permanent recruitment	42%	42%	17%
Contracting/Consulting	35%	34%	30%

Compared to six months ago, more companies are hiring again, even if few are hiring a lot.

42% are recruiting permanently vs just 19% in April. 50% of large companies plan to do some hiring of permanent staff vs 32% of small companies. 35% are taking on contractors and/or consultants, compared to 19% in April.

42% however still have permanent recruitment on hold, vs 63% in April.

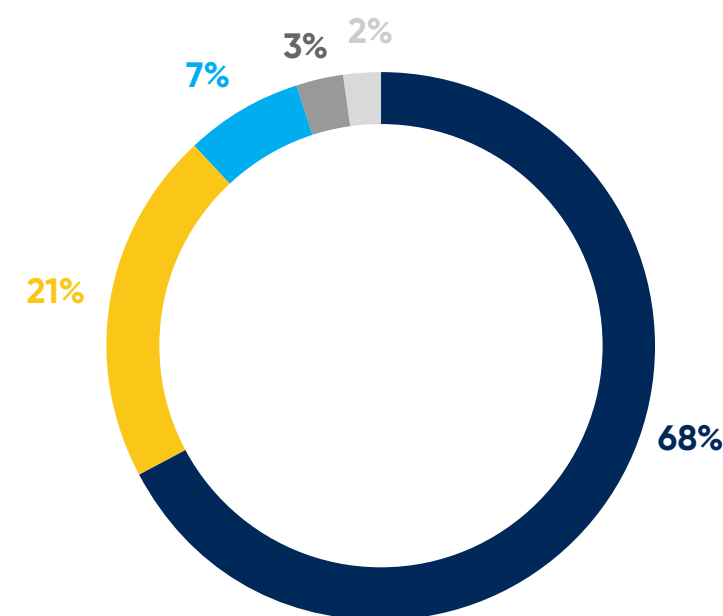
Telco, education, retail, financial services and tech are more likely than others to be in hiring mode. Additionally, retail, education, FMCG/food, tech, media & publishing, e-commerce and not for profit sectors may offer more consulting and contracting opportunities.

6. working from home

We explore where people are working, how working from home is working for them now, six months in, and when they think they'll work predominantly from their office or workplace, if ever.

Where working this quarter

The vast majority of respondents will continue to work from home this quarter. In general, it is working for people personally and for their roles, in particular for females.



Working from home
Mix of home and office/workplace
Working from office/workplace
 Don't know yet
 N/A

Although the majority will be working from home, the most junior and most senior will be going into the office/workplace more than others. 36% of support level and 39% of directors will be working out of the office/workplace some or all of the time, compared to 28% average.

Those working for large companies will be much more likely to work from home this quarter (81% of large company respondents vs 56% of small).

When your business will predominantly return to the office/workplace

Respondents feel **working from home** will continue for the foreseeable future. Only 16% anticipate a return to the workplace by January and only 40% by spring 2021.



How working from home is working

	Sept 2020	April 2020
Works for me and works for my role	57%	54%
Works for me, but not great for my role	16%	15%
Works for my role, but not great for me	17%	17%
Doesn't work for me or my role	6%	7%
N/A	4%	5%

Working from home is still working well for a majority of respondents, with 57% reporting that it works for both them and their roles. However, 23% do not think it works for their role and sentiment also varies by seniority and gender.

74% of those at support level feel it works for them and their role, whereas only 43% of director level respondents feel the same. 35% at this senior level say it does not work at all.

More females (69%) say it works for both them and their roles than their male counterparts (47%). 29% of male respondents feel it does not suit their role vs 18% females. Double the percentage of males vs females (32% vs 16%) have a role that is now very sales focused, an area that is potentially difficult to manage remotely, which may go some way to explaining the disparity.

In addition, 19% of male respondents say working from home does not work for them personally at all, vs 15% of females.

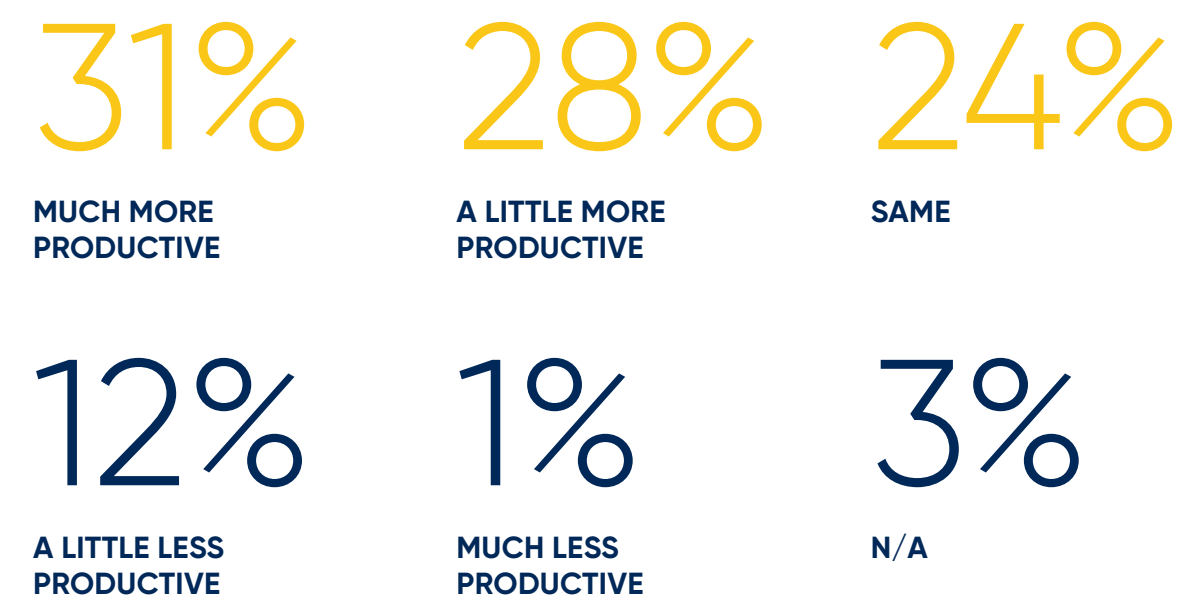
6. working from home cont.

Working from home seems to be working. Two in three feel they are more productive. They can apply the time not spent not commuting to their role and to a better work life balance.

That said, they do not wish to stay working full-time from home forever and see a hybrid model, with a mix of home and workplace, as the ideal in the future.

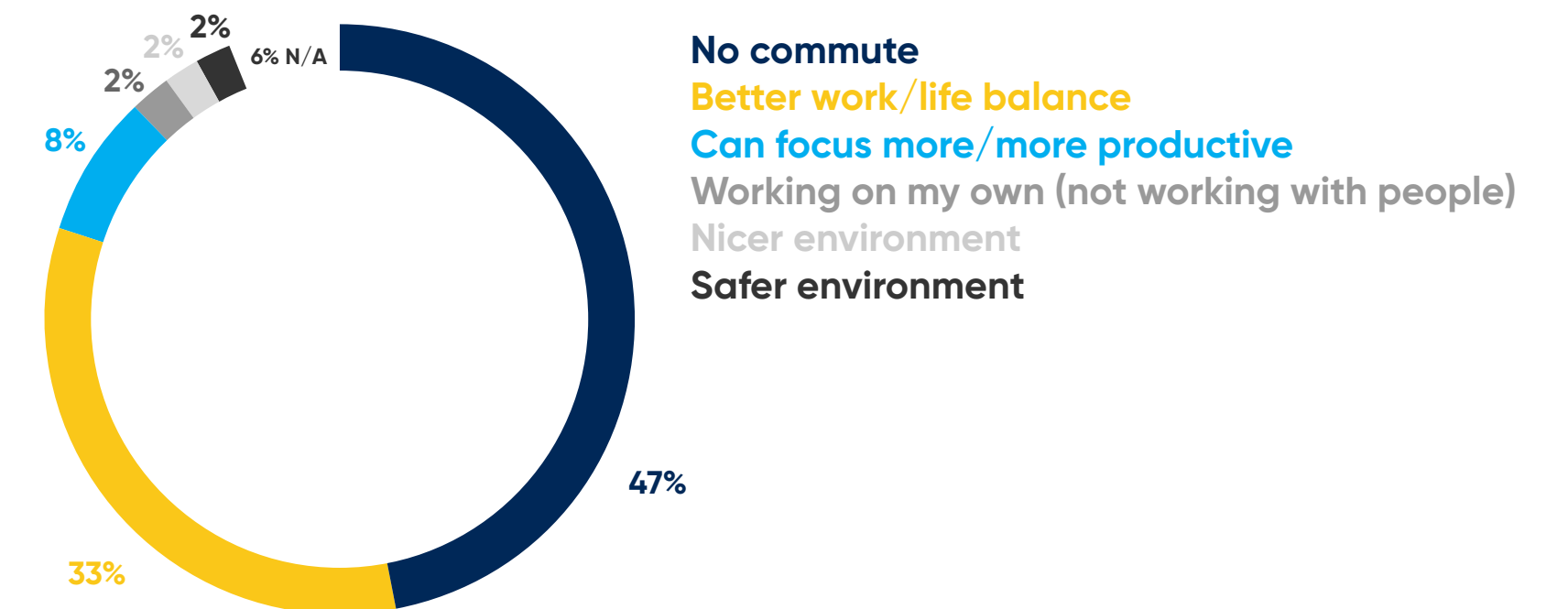
Productivity working from home vs workplace/office

A majority of 59% feel they are much or a little **more productive** working at home. Only 13% feel less productive. Women are more likely to feel much more productive than their male counterparts, who are more likely to feel a little more productive.



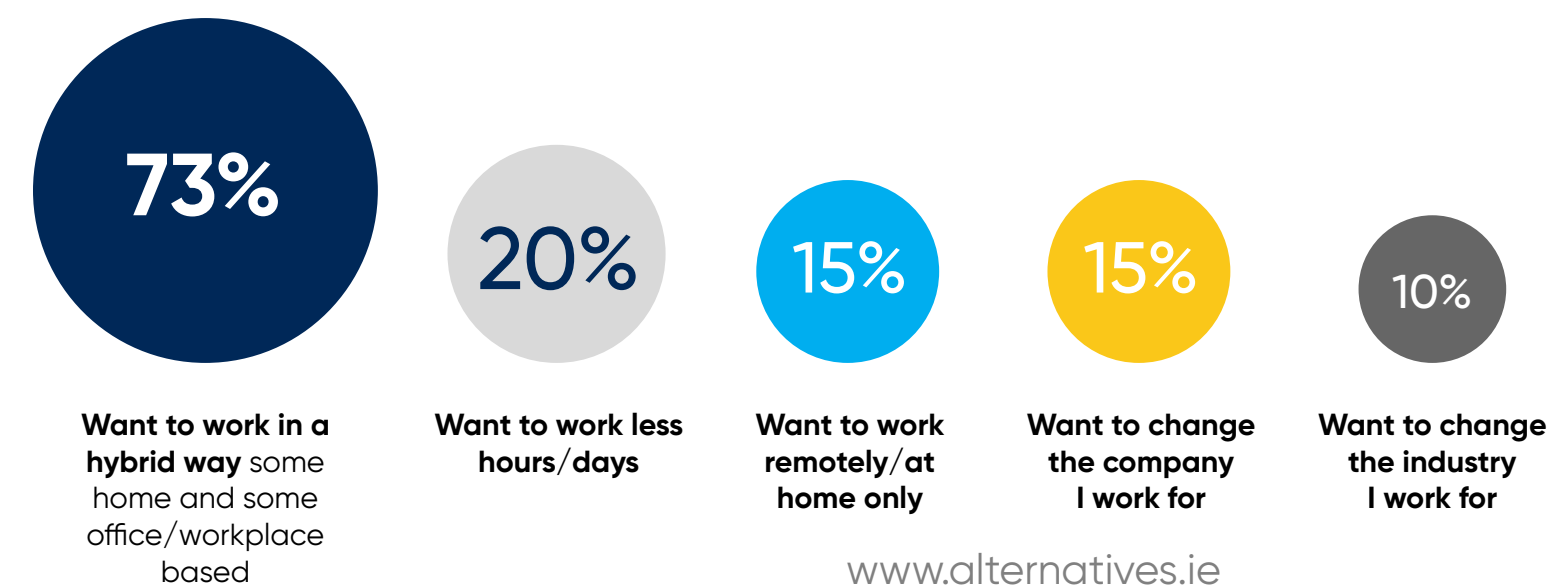
Single favourite thing about working from home

For those working from home, no commute and a better work life balance are the key reasons why, for both male and female respondents.



How Covid has impacted how they want to work

Most respondents do not want to go back to the ways of working they had before. Overwhelmingly, irrespective of seniority, they want to work in a hybrid way, with a mix of workplace and home-based working.



The large majority of both males and females would like to work in a hybrid way in the future.

25% of females would like to work reduced hours- double that of men. Those at mid-career level- those most likely to have younger children- are also more likely to want to work reduced hours/days.

15% do not ever want to return to the workplace- with more females (18%) than males (10%) wanting to work permanently at home. Only 8% at director level would like to work from home only.

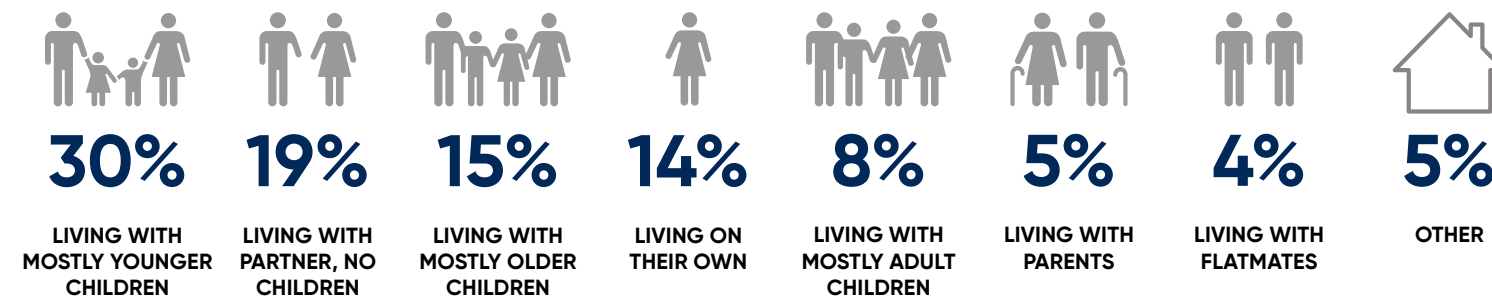
21% of those in smaller companies want to change company they work for, many presumably for larger organisations and sectors which can withstand financial difficulties with more ease. 14% of male respondents would like to change industry.

7. personal impact of covid

We explored living arrangements to help understand the personal pressures people may be under and how they are coping overall.

Current living arrangement during this crisis

45% of respondents are living with school going age children or pre-schoolers. 36% are living in households with adults and 14% are living on their own.

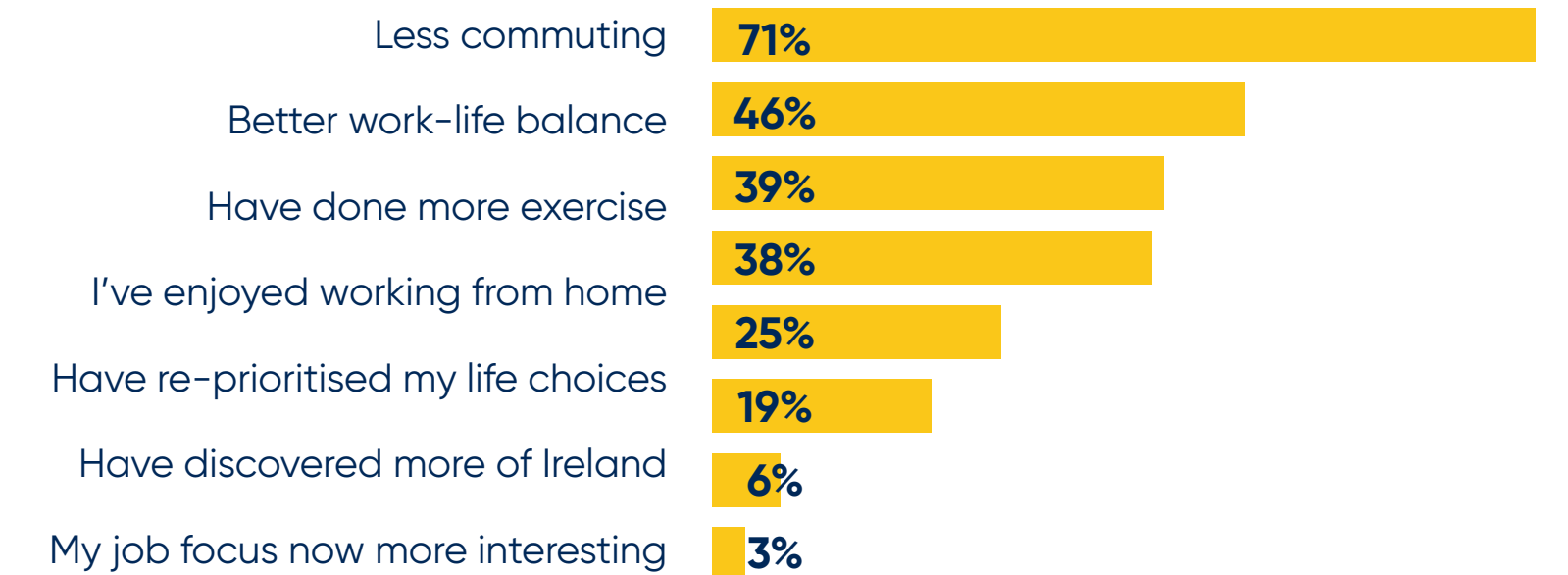


Coping overall

When asked how they were coping overall, both female and male respondents gave an average score of **6.7 out of 10**, down a little from 7 out of 10 in April, likely influenced by the recent increase in Covid cases and the move into autumn/winter.



Positive impact of this pandemic, if any



Less commuting and a better work life balance are the key positives for marketing community respondents and many are simply enjoying working from home, especially females. Many also have taken the time to exercise more.

Half of all earlier career stage respondents say they have reprioritised life choices since Covid and have discovered more of Ireland.

Half of male respondents enjoy the better work life balance this has brought and increased exercise (46% vs 34% females). One in four females say that they have reprioritised life choices

7. personal impact of covid cont.

Most have managed the immediate crisis well. With no sign of Covid abating, managing the well-being of employees as we go into winter is critical.

Key concerns to manage, as we go into autumn and winter



Over half of respondents-both male and female-find the lack of personal interaction with their teams and clients difficult and their biggest concern. This is followed by increased workload, which is a much bigger issue now, six months in, for 41% compared to 18% of respondents in April. It is highest for those at head of function level (52%) and females (44%).

Undoubtably linked, personal stress has massively risen and is a key concern for 39% vs 14% in April. For male respondents it is their second largest concern (41%), slightly more than for females at a still very high 38%.

Junior career level respondents find managing stress more difficult, as do heads of functions.

With school back on, managing children is less of a pressure point (22% vs 32% vs in April), although it remains a concern and especially for those at mid-career level (28%). People seem to have sorted office space at home. It was an issue for 28% in April but is now only for 10%.

summary

Looking ahead

The Covid pandemic has deeply impacted businesses and attitudes. Some sectors have been hit almost beyond repair, some are finding positives for their businesses and for themselves personally.

With both Covid and Brexit impacting heavily in the short and medium term, companies will need to embrace agility, to re-shape strategy, adapt and pivot. Customers must be at the centre of this rethink. Insight and intelligence must be applied to the urgent, commercial imperative. Communication and engagement of all stakeholders-internal and external-will be key. The role of marketing at this time is critical and presents a real opportunity for all marketers to demonstrate their value add.

In the quest for survival and business growth, companies must redouble efforts to engage with and effectively manage their employees now, to manage their workload and their personal stress levels. They will also need to respond to the very strong desire of employees to work in a hybrid way in the longer term.

From Alternatives perspective

Agility and great marketing talent, both core to us, have never been more important. We are here to help you manage workload, to bring new marketing, strategic and digital expertise to you, flexibly.

Contractors, remote managers, consultants, coaches, skills builders. Talented people for a quick stint or on a full-time basis. Don't hesitate to get in touch, so we can help you and your business to survive, indeed thrive, in these changing times.

From everyone in the Alternatives team, stay safe and well.

our tribe changes the game by **NOT ACCEPTING ordinary**. They are growth agents & customer evangelists, driving transformation in a data driven, digitally enhanced age. **THEY LIVE AT THE FRONT OF TRENDS** and new technologies, bringing insight, understanding and **innovation** to their customers. They recognise that to be truly successful they must put the **customer at the heart** of their company strategy. Our tribe builds outstanding brands and businesses. **Our tribe powers growth.**



new natives

new ways of working



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