IA Virtual Town Hall
Continuing Through COVID
Friday, July 10, 2020
MEET THE PRESENTER:

CHRIS JACKSON
SENIOR VICE PRESIDENT
IPSOS
CHRIS.JACKSON@IPSOS.COM

Chris is lead for the Ipsos Public Polling practice in the U.S. His research specialties include public opinion trends, election polling, strategic communications and reputation research. He works with a wide variety of public and private sector clients including media partners Thomson Reuters, USA Today, and ABC News.

Chris is an expert on American electoral and public polling. Beyond politics, Chris has worked across a wide range of research subjects, including technology, healthcare, policy, energy and consumer issues. He has been a featured commentator on BuzzFeed, BBC, Sky News, CBS, and elsewhere.
MEET THE PRESENTER:

KATHY SHEEHAN
SENIOR VICE PRESIDENT
CASSANDRA (ENGINE)
KATHY.SHEEHAN@CASSANDRA.CO

Kathy leads the Cassandra business unit within ENGINE, which focuses on empowering clients to build culturally relevant brands by leveraging insights from trendsetting young consumers. Previously, Kathy served as EVP of GfK Consumer Life, where she led a global business unit that conducted the longest-running global study of consumer trends, covering more than 25 markets and 30,000 consumers annually. She serves on the Advisory Board of the Rutgers University Customer Experience program as well as the FIT Home Products Advisory Board. Her commentary has been featured on CNBC, in BrandWeek, Ad Age, The New York Times, and elsewhere.
MEET THE PRESENTER:

LAURA CRAIG
VICE PRESIDENT
DELVINIA
LCRAIG@DELVINIA.COM

As VP of Client Success at Delvinia, Laura enables clients to incorporate research technologies into their toolkits, giving them more opportunities to incorporate insight into their business decisions. Laura co-founded CRIS, a text-based virtual moderator that gets at the ‘why’ behind consumers’ perceptions and behaviors faster and with less expense. CRIS was acquired by Delvinia in 2019.
Consumer perceptions not in line with economic reality

American consumer confidence and unemployment 2002-2020

Ipsos Primary Consumer Sentiment Index / US Bureau of Labor Statistics
Black Americans more likely to have suffered career setbacks during the pandemic

Black Americans more likely to have lost their jobs in April & are less likely to have gotten their job back now

<table>
<thead>
<tr>
<th>Furloughs and suspensions: mid-April</th>
<th>Lay offs: mid-April</th>
<th>Return to workforce: late June</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have you personally been temporarily furloughed or suspended from work in the last few weeks? (% Yes)</td>
<td>Have you personally been laid off in the last few weeks? (% Yes)</td>
<td>Have you personally returned to work after being furloughed, laid off, or your employer closing in the last few weeks? (% Yes)</td>
</tr>
<tr>
<td>All Americans</td>
<td>White</td>
<td>All Americans</td>
</tr>
<tr>
<td>18%</td>
<td>19%</td>
<td>12%</td>
</tr>
<tr>
<td>Black</td>
<td>Hispanic</td>
<td>Black</td>
</tr>
<tr>
<td>22%</td>
<td>14%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Axios-Ipsos Coronavirus Index, survey conducted April 10 – April 13, 2020 (jobs lost); survey conducted June 26-29, 2020 (jobs regained)
Americans are divided on reopening the economy if the virus is still spreading

We should restart the economy and allow businesses to open even if the virus is still not fully contained
America’s Social Distancing “Grade”

A surge in activity around Memorial Day corresponds with a spike in new coronavirus cases across the nation.

From early to late June: Effect of Texas renewing social distancing measures evident; social distancing lessened across Florida as cases rose.
Mask use is diverging along partisan lines as the pandemic progresses

% Who always wear a mask at all times when visiting friends and family

Democrats

Republicans

Bunkering Down (Apr 3-20) Adaptation (Apr 24-May 18) False Dawn (May 29-Jun 8) COVID Returns (Jun 12-29)
Key issues impacting the 2020 election

If the 2020 presidential election were being held today, which of the following candidate traits would be the MOST important factor for you in deciding who to vote for?

<table>
<thead>
<tr>
<th>Trait</th>
<th>All Adults</th>
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</thead>
<tbody>
<tr>
<td>Has a robust plan to help the nation recover from the impact of coronavirus</td>
<td>26%</td>
</tr>
<tr>
<td>Ability to restore trust in American government</td>
<td>31%</td>
</tr>
<tr>
<td>Strong on the economy and job creation</td>
<td>20%</td>
</tr>
<tr>
<td>Strong on healthcare</td>
<td>9%</td>
</tr>
<tr>
<td>Strong on immigration</td>
<td>5%</td>
</tr>
<tr>
<td>Strong on civil rights</td>
<td>8%</td>
</tr>
</tbody>
</table>

Candidate Matchup:
Ability to restore trust in American government

40% Biden
29% Trump
LIFE INTERRUPTED
The immediate impact of Covid-19 on Gen Z & Millennials
a defining moment
The generational effect of financial worry

Together, the actions of these younger generations are poised to have an outsized impact on the economy compared to the actions of Boomers and Xers, both of whom are both less fearful and less likely to be already taking action.

<table>
<thead>
<tr>
<th>Generation</th>
<th>Gen Z</th>
<th>Millennials</th>
<th>Gen X</th>
<th>Baby Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cohort size</td>
<td>87M</td>
<td>75M</td>
<td>61M</td>
<td>72M</td>
</tr>
<tr>
<td>Proportion of the generation that has fears about the economy</td>
<td>85%</td>
<td>92%</td>
<td>82%</td>
<td>74%</td>
</tr>
<tr>
<td>Relative impact</td>
<td>74 Million</td>
<td>69 Million</td>
<td>50 Million</td>
<td>53 Million</td>
</tr>
</tbody>
</table>

Source: ENGINE Caravan.. Net Have an financial fears or worries in light of Covid-19
Millennials most likely to take action based on their economic fears

Which, if any, of the following have you done since March?

Source: ENGINE Caravan
Millennials cutting back more than any other generation

Which, if any, of the following purchases have you postponed since the Covid-19 outbreak began in March?
Meet Ian, 34, CA

“It is a lot more difficult to save money, and we could probably forget about the concept of the ‘American Dream’ or retirement and living the rest of our lives comfortably.”
Life Disruption Due to the Pandemic, Millennials vs. Zs
Meet Ikram, 18, IL

“... it breaks my heart because this was my senior year. I was looking forward to going to prom (I already bought a dress) and graduation (I already got an outfit for this event as well).”
Fear of missing out on moments

Youths’ general attitude toward wanting to take part in everything and their reluctance to miss out on an event, especially when an event is shared on social media and they’re nowhere to be found.

No moments

The situation youth find themselves in amidst the Covid-19 pandemic and subsequent shutdown, wherein every event they were looking forward to was cancelled or postponed indefinitely, leaving them with no moments in which they can come together with friends to celebrate a life milestone (such as prom, a graduation, or a wedding).
Attitudes Around Remote Learning (Teens 13-17)

- Agree remote or distance learning is not as rigorous as in-classroom learning. (34%)
- Agree that they feel isolated when they are not attending school. (31%)
- Agree it is hard to get motivated without a set school schedule. (45%)
- Agree attendance and grades are not as important in remote school learning. (23%)

Source: ENGINE Caravan Age 13-17.
Recalibrating the College Experience

Please select the ONE statement that you agree with more (Among 13 to 17 year olds)

- 57% I’d rather take college classes, even if it is to be remote/online learning
- 43% I’d rather wait to take college classes until I can attend in person

Meet Brittany, 20, TX

“I'm really pissed that I am paying full tuition at Columbia University for half a semester of online classes, [with] no access to libraries or facilities, after having been evicted and having to pay $600 to get my things out of my dorm because they wouldn't let me return to pack. Online classes just are not the same. Everyone cheats so if you don't cheat it looks like you’re doing much worse than other students. There are more distractions at home, and it’s hard to pay attention. Also I live in a semi-rural area so my wifi is trash, and I get kicked off my class Zoom calls very routinely.””
Looking to improvement

Coming out of the pandemic, I will be a better version of myself

Coming out of the pandemic, I will have accomplished something
Meet Danita, 18, PA

“Gen Z has a tenacity and need to rebel more so than their parents did. I think we’ll be happier [than they were] and fight more for what’s right, but I think we will be heavily disadvantaged economically due to the collapsing market.”
Things we are thinking about

The economic headwinds
Sense of loss
Education disruption
Importance of self-direction
“Life long learning”
for more information

Kathy Sheehan
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Senior Vice President
CASSANDRA
CASSANDRA

SEE TOMORROW
Impact of COVID-19 on the Market Research Community

Laura Craig
VP, Client Success
Delvinia
Method

• 333 members participated between April 24 and May 6, 2020

• Using CRIS, our AI-enabled virtual moderator
How much has the way you are doing research now changed since COVID-19?

Key changes:

• Pivot to online methods, research technologies

• Using technology to enable working from home

N = 333
Feelings about these changes

Surprises:

• Ease of transition to working remotely
• Quality of life improvements

Employees have adapted remarkably well. They have a can-do attitude that is incredibly refreshing.
Challenges

• Financial insecurity
• Loss of human connection
• Juggling work and home life

“Working from home with a kid, husband, dog, and two cats constantly barging in and demanding things (ok, the cats keep to themselves... they're cool) is extremely challenging”
Market Research after COVID-19

Post-COVID, Insights Association members expect that they will:

• Use online research technologies and methods more often
• Make use of more flexible schedules which permit working from home
• Travel significantly less

"We're getting accustomed to the changes now"

"We have proven that it can be effective"
COVID-19 MEMBER SURVEY
Wave 3: June 17-July 4, 2020

Understanding the ripple effect this pandemic is having on our industry and our partnerships

In partnership with: QUESTER, Infotools, gongos
ALTHOUGH MEMBERS ARE BEGINNING TO CAUTIOUSLY RE-ENTER OFFICES, THE INDUSTRY HASN’T IMPROVED

RE-ENTRY MAY BE BRINGING OPERATIONS BACK, BUT TIME WILL TELL IF FINANCIAL MOMENTUM follows

Compared to Wave 2...

**Cancellations / Postponements:** More postponements are shifting to confirmed cancellations across all types of work

**Work Impact:** The need to move in-person work online is slowing, as some begin to cautiously get back in field

**Operational Impact:** Budget cuts are widespread, impacting mostly staffing and some facility decisions

**Initial Re-entry Picture:** Some are proceeding cautiously with travel, in-person fielding and new work policies, but others continue to remain self-contained

**Future Outlook:** Agency pipelines lighten up further, while the corporate gap widens for planned studies
MORE POSTPONEMENTS ARE SHIFTING TO CONFIRMED CANCELLATIONS ACROSS ALL TYPES OF WORK

% EXPERIENCING CANCELLATIONS & POSTPONEMENTS

Total Member CANCELLATIONS

<table>
<thead>
<tr>
<th></th>
<th>W1</th>
<th>W2</th>
<th>W3</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; 20%</td>
<td></td>
<td></td>
<td>37%</td>
</tr>
<tr>
<td>1-20%</td>
<td></td>
<td></td>
<td>44%</td>
</tr>
<tr>
<td>None (0%)</td>
<td></td>
<td></td>
<td>19%</td>
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</table>

Total Member POSTPONEMENTS

<table>
<thead>
<tr>
<th></th>
<th>W1</th>
<th>W2</th>
<th>W3</th>
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<td>&gt; 20%</td>
<td></td>
<td></td>
<td>39%</td>
</tr>
<tr>
<td>1-20%</td>
<td></td>
<td></td>
<td>51%</td>
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<tr>
<td>None (0%)</td>
<td></td>
<td></td>
<td>10%</td>
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96% are still being flexible with cancellation policies

Up arrow indicates number significantly higher than Wave 2

All types of work are still being impacted by cancellations and postponements

Total Member TYPE OF WORK IMPACTED

<table>
<thead>
<tr>
<th></th>
<th>W2</th>
<th>W3</th>
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<tbody>
<tr>
<td>Equal Parts Qual/Quant</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mostly Qual</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mostly Quant, Software, or Data Analytics</td>
<td>31%</td>
<td>42%</td>
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</tbody>
</table>

Mostly Quant, somewhat

PROTECT ♦ CONNECT ♦ INFORM ♦ PROMOTE
THE NEED TO MOVE **IN-PERSON WORK ONLINE** IS SLOWING, AS SOME BEGIN TO CAUTIOUSLY GET BACK IN FIELD

MEMBERS SHIFTING 80% OR MORE OF IN-PERSON WORK TO ONLINE

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<tr>
<th></th>
<th>W1</th>
<th>W2</th>
<th>W3</th>
<th>TOTAL</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>45%</td>
<td>38%</td>
<td>33%</td>
<td></td>
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</table>

Decline may be due to less work available or designing for online becoming the new norm.

12% Fully up and running or never stopped in-person

24% Limiting markets or using controlled facilities only

64% Still not doing in-person work

While states begin to reopen, in-person fielding is happening only in controlled, low risk settings.

Note: directional decline only
WITH NO SIGN OF IMPROVEMENT, MANY ARE TAKING A HARD LOOK AT EXPENSES TO RECALIBRATE

EMPLOYEES ARE FEELING THE SQUEEZE AS MEMBERS RESORT TO LABOR CUTS TO STAY AFLOAT

- **35%** Made salary reductions
- **25%** Laid off employees (23% in Wave 2)
- **22%** Made other cuts that directly impact employees (cut PTO, 401k match, etc.)
- **21%** Furloughed employees

SOME ARE CONTINUING EFFORTS TO ENSURE SAFETY AND REDUCE OVERHEAD

- **10%** Eliminated building overhead expenses, moving to 100% remote
- **2%** Have permanently closed facilities (2% in Wave 2)
- **12%** Have temporarily closed facilities (50% in Wave 2)
MEMBERS ARE BEGINNING TO SAFELY RE-ENTER OFFICES WITH NEW POLICIES, BUT TRAVEL IS STILL RESTRICTED

57% HAVE STARTED TO REOPEN OFFICES

The actions they are taking include...

- Making sanitizer/cleaning supplies available everywhere: 70%
- Using socially distanced desks or other seating: 65%
- Requiring masks in the building: 59%
- Staggering start times for staff: 30%
- Hiring special staff for cleaning/sanitizing: 13%
- Not taking any special measures: 23%

TRAVEL IS STILL LIMITED

- Not allowing travel: 77%
- 14% Only business critical travel
- 6% Only to low-risk markets

Notable actions to watch (not top answers)
- Using socially distanced desks or other seating: 65%
- Requiring masks in the building: 59%
- Not taking any special measures: 23%
The divide among corporate members continues to grow. Growth of planned studies reveals sustained momentum, though members reporting declines continue to worsen. Agencies are still seeing large pipeline declines.

FUTURE OUTLOOK REMAINS THE SAME, BUT SIGNS OF CORPORATE GROWTH WILL BE IMPORTANT TO WATCH

80% of total members are somewhat or very concerned about future outlook.

*Extremely small sample size (n=28), interpret with caution.
IA Mental Well-Being Research
In Partnership with Opinium, MRS, and The Research Society

Well-Being Findings

• 83% have experienced a mental health problem in the last 12 months (includes depression, anxiety, feeling low/down, stress, exhaustion/burnout, panic attack, other mental health problems)
• 85% said their work was negatively impacted by a mental health problem in the past 12 months
• Only 30% actually took any time off work for their mental health vs. 42% for physical health problems
• 58% of those who have struggled with their mental health told someone at work about it
• 41% would feel embarrassed if their colleagues discovered they were struggling with their mental health
• 10% said their workplace doesn’t offer anything to support their mental wellbeing

COVID-19 Findings

• 64% say their employer has been very supportive during the covid-19 pandemic, but 11% say their employer has not been supportive
• Almost the whole industry is working from home (97%), and many want to keep working from home to varying degrees after the pandemic (94%)
• Overall the industry sways towards feeling negative about returning to the office, with 46% feeling apprehensive and 47% reluctant.
• Top concerns about returning to the office are:
  • General hygiene of the office (46%)
  • Logistics of social distancing desks (45%)
  • Losing the free time gained when working from home (38%)