

**SPECIAL COVID-19**

the alternatives  
marketing at work  
pulse **survey 2020**



**Alter**  
your trajectory



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## the alternatives marketing at work pulse **survey 2020**

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The Alternatives Pulse Survey, completed in May 2020 with 442 respondents, provides a fascinating, real-time glimpse into how our marketing community has been impacted professionally and personally by the coronavirus crisis.

From a business perspective, as each one of us has felt, the impact has been both sudden and significant and is really the only issue on the agenda currently.

However our survey demonstrates that despite a volatile working environment, with employment and salaries impacted, marketers are proving resilient and are coping well with the crisis.

Marketers have immediately re-focused their roles. They have taken on the challenge of crisis management, helping their companies respond in the short term as well as shaping future strategies and new business models. As we move to our "new normal", Marketers' skills in strategic planning, in customer insight, communications and digital will never have been more in demand.

For our community, in the midst of this crisis, there are upsides to working from home, and many will want to continue working in a new and balanced way when the eye of the storm passes. Companies will have seen that it can work. By being flexible with their teams and how they access talent, they will attract, motivate and retain the best.

Our pledge is that Alternatives will continue to work hard to help businesses access this great marketing and digital talent, to provide flexible working opportunities and to support the community with insight and guidance through this complex time.



**Bernie Keogh**  
Managing Director,  
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# 1. profile of respondents

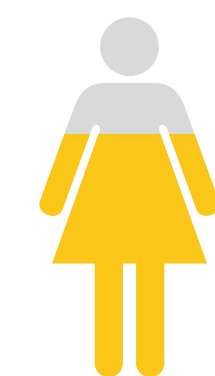
**The Alternatives Marketing at Work Pulse Survey** was carried out from 27th April – 5th May 2020. It was completed by 442 people in the marketing community in Ireland.

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



● From across sector and from both small and large companies.



**62%**  
Female Respondents



**38%**  
Male Respondents

## Company size

**36%**  
1-50 EMPLOYEES

**18%**  
51-200 EMPLOYEES

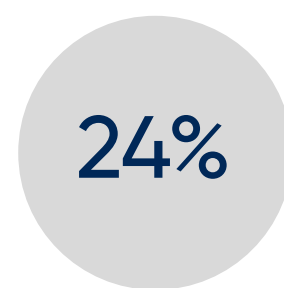
**46%**  
201+ EMPLOYEES

## Respondents by level

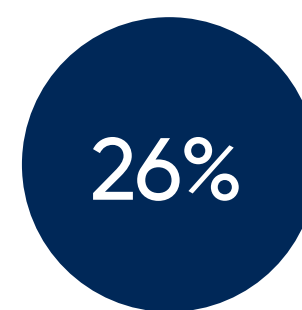
20% are at relatively early career stage, 26% at mid management level and 54% at head of function or director level.



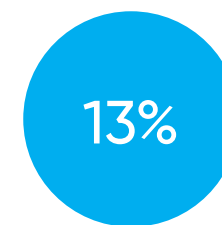
DIRECTOR



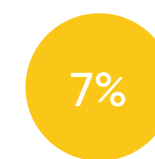
HEAD OF



MANAGER

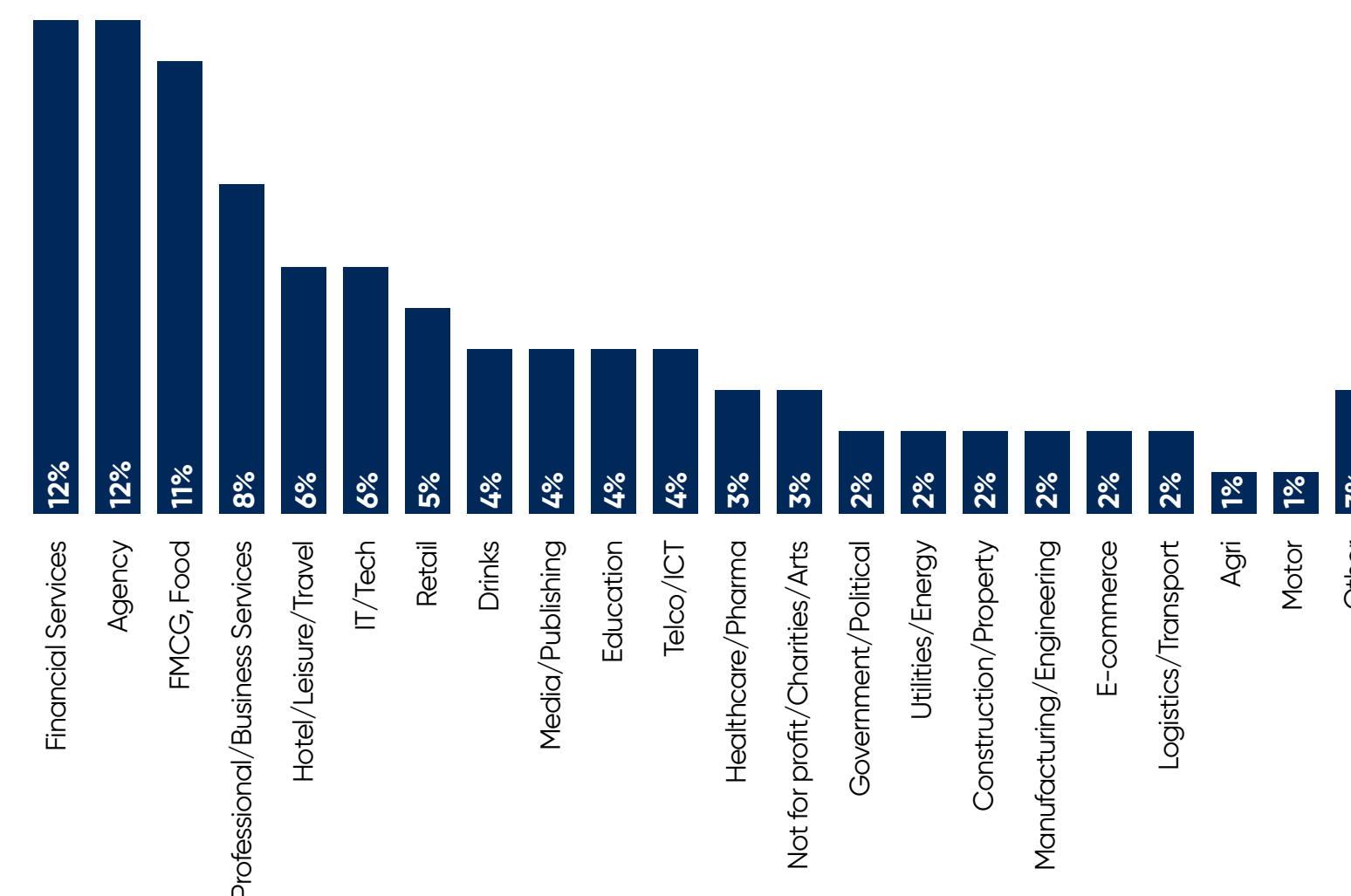


PRACTITIONER



SUPPORT

## Respondents by sector



## Current living arrangements

We asked about current living arrangements to understand more about their personal circumstances and the resultant pressures they may be under. We explore some of these differences in the **personal impact** section.

46% are living with school going age children or pre-schoolers. 40% are living in households with no children and 14% are living on their own.



**36%**

LIVING WITH SCHOOL GOING AGE CHILDREN



**26%**

LIVING WITH A FRIEND/PARTNER /FLAT SHARE; NO CHILDREN



**14%**

LIVING ON THEIR OWN



**10%**

LIVING WITH SMALL CHILDREN (PRE-SCHOOLERS)



**9%**

LIVING WITH ADULT CHILDREN



**3%**

LIVING WITH PARENTS



**2%**

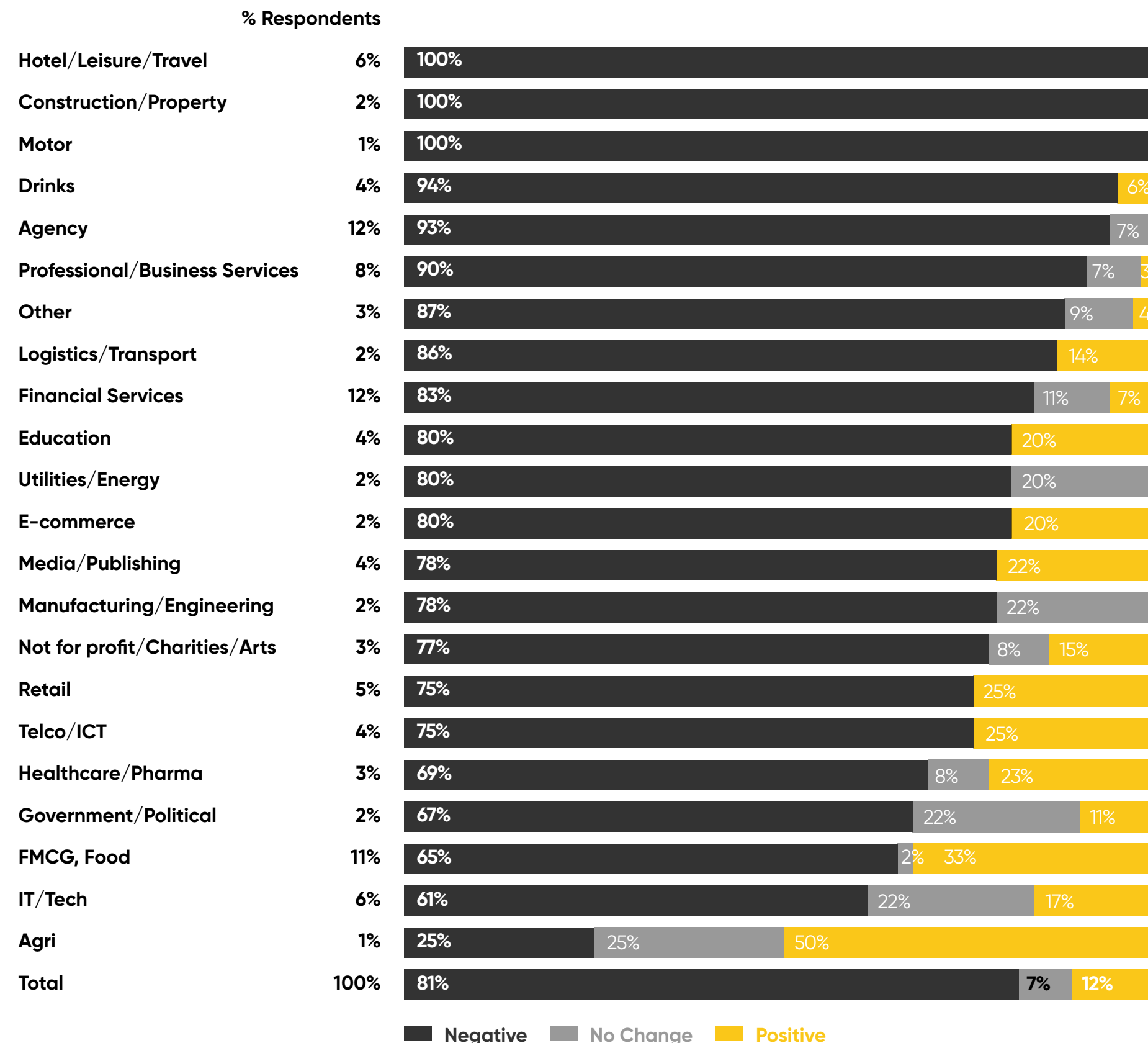
OTHER

## 2. impact on business

The impact of the crisis is significant, with 81% of respondents rating it as having had a negative or very negative impact on current business performance.

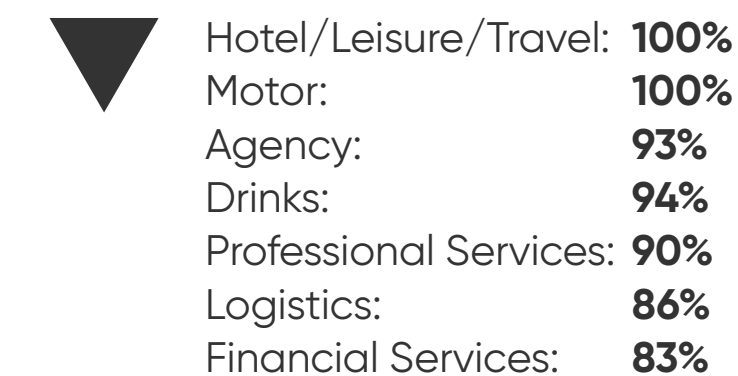
12% however have seen some positive impact, including unsurprisingly FMCG and retail.

### Impact on your organisation's current business performance



\*Bear in mind that sample size for some sectors is very small

### Most negatively impacted



### Some positive impact



Small businesses of less than 50 employees rate themselves as very negatively impacted more than their larger counterparts (42% vs 36%).

## 2. impact on business

Three quarters of respondents anticipate a negative future impact on their organisation.

Sectors such as tourism, drinks, professional and business services, logistics, construction and agencies feel most pessimistic about the future business impact of the Coronavirus.

17% see some positive future impact, particularly those in healthcare, e-commerce, and tech.

### Future, longer term impact of coronavirus on the organisation

In the chart below we highlight sectors in order of perceived future negative impact.

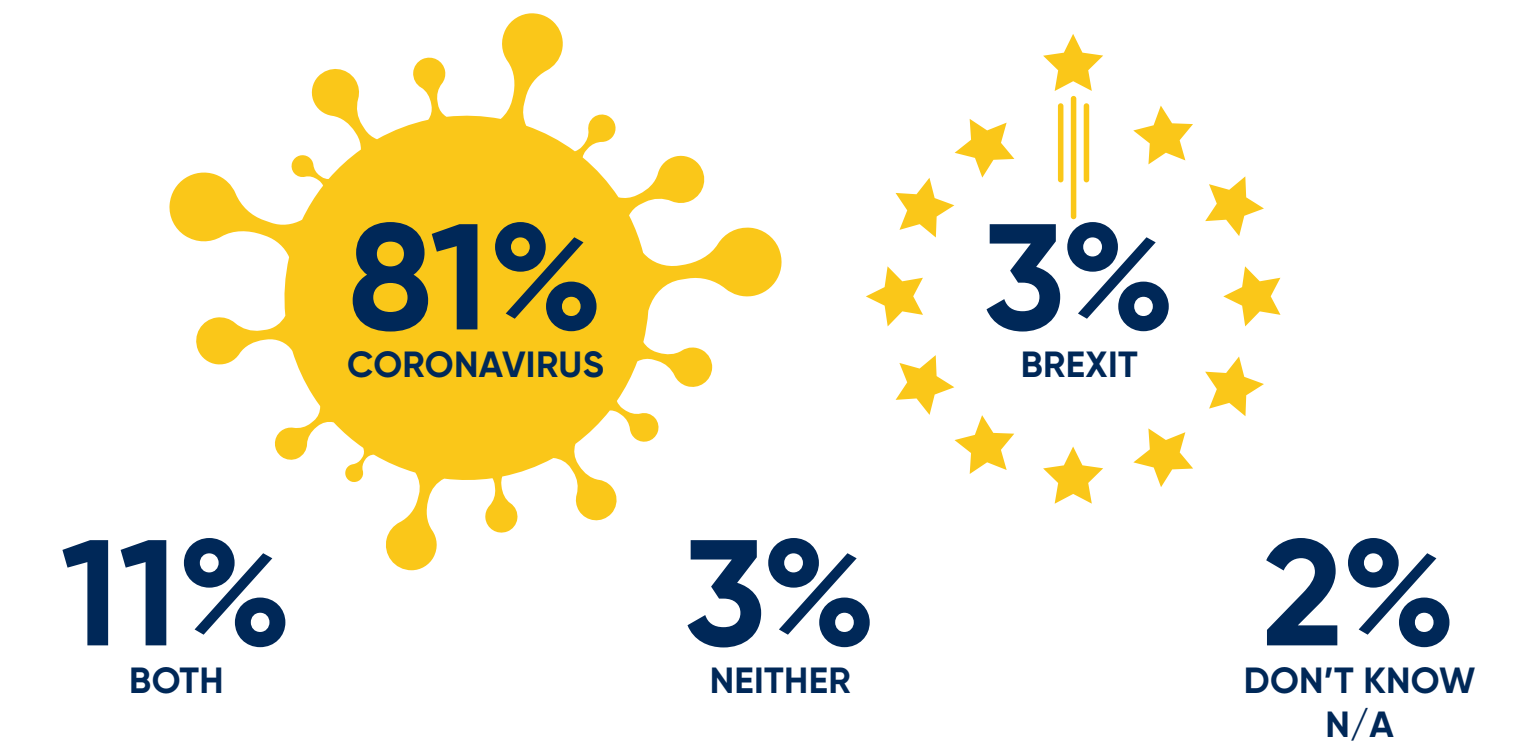
#### View, by sector, of future impact on their organisation

	Negative	No change	Positive	Don't know
Hotel/Leisure/Travel	<b>92%</b>	0%	0%	8%
Drinks	<b>88%</b>	0%	6%	6%
Professional/Business Services	<b>87%</b>	0%	13%	0%
Logistics/Transport	86%	14%	0%	0%
Construction/Property	<b>83%</b>	17%	0%	0%
Agency	80%	4%	11%	4%
Retail	80%	0%	10%	<b>10%</b>
Motor	80%	0%	0%	<b>20%</b>
Telco/ICT	76%	6%	12%	6%
Agri	75%	0%	25%	0%
Media/Publishing	72%	6%	22%	0%
FMCG, Food	72%	5%	19%	5%
Financial Services	70%	6%	21%	2%
Utilities/Energy	70%	20%	10%	0%
Manufacturing/Engineering	67%	0%	22%	11%
Other	64%	12%	16%	8%
Not for profit/Charities/Arts	62%	8%	31%	0%
IT/Tech	58%	0%	<b>33%</b>	8%
Education	56%	19%	25%	0%
Healthcare/Pharma	54%	8%	<b>38%</b>	0%
E-commerce	40%	0%	<b>60%</b>	0%
Government/Political	33%	33%	22%	11%
<b>Total</b>	<b>73%</b>	<b>6%</b>	<b>17%</b>	<b>4%</b>

### Brexit or Coronavirus a bigger issue for your business

Coronavirus has completely overtaken Brexit as the key threat.

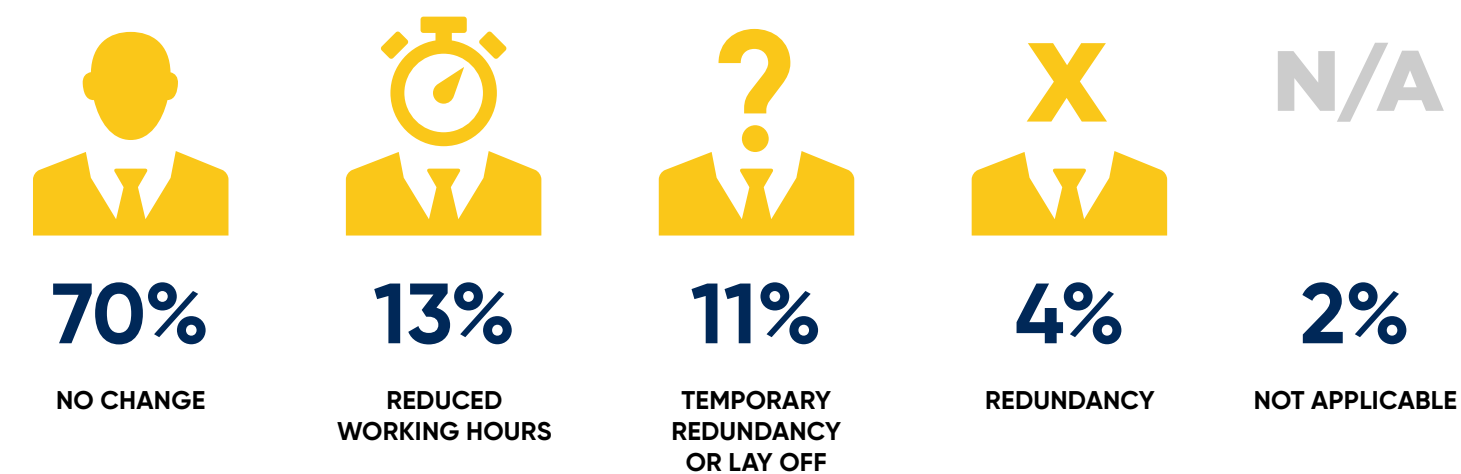
Brexit still remains a key issue for those in the FMCG and financial services sectors in particular.



### 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



As of 5th May, 70% of respondents have had no change to their **employment status** to date.

15% have been made redundant or laid off on a short term or permanent basis and 13% are working reduced hours.

Those at early career stage were impacted more than those at more senior levels and were more likely to have been laid off on a temporary basis (26%) than average (11%).

Hotel and tourism sectors have been the hardest hit to date. 29% are on temporary layoff, and 25% on reduced hours. 29% of professional and business services and 26% of agency respondents are on reduced hours.

Some referenced their companies applying for wage subsidies. Several respondents referenced working increased hours on no extra pay and several also anticipate future cuts and changes.

Those working in small companies have been much more impacted. 25% vs 13% on average have had their working hours reduced. 17% vs 11% have had been temporarily laid off and 7% vs 3% have been made redundant.

87% of respondents working in large companies of 200+ employees have had no change to their employment status.

#### Salary impacted due to coronavirus

60% have had no change in salary at this point. One in three have had a salary reduction, most of which 11% or more. Some who have not had salary impacted have however had bonuses cut or postponed, and several anticipate changes to come.

▼ Reduction 1-10%	4%
▼ Reduction 11-20%	12%
▼ Reduction 21% +	16%
► No change	60%
▲ Salary has increased	1%
N/A	4%
Other	3%

In terms of sectors, respondents from financial services, utilities and government have not recorded any salary reductions. Those in telco, tech and FMCG are also much less impacted than average.

Those working in small companies have been much more impacted in salary terms. 50% vs 31% on average have had their salary reduced, and more than half of those with cuts of over 20%. By contrast only 17% of those working in large companies have had salary cuts yet.

### 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.

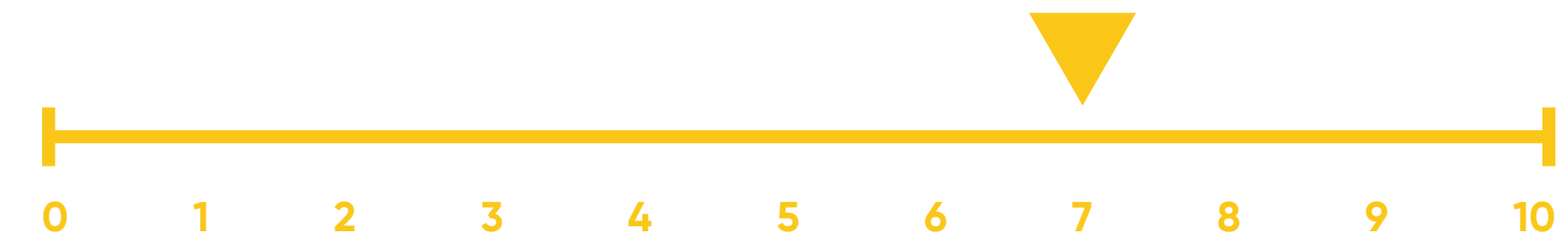
#### Salary changes by level of seniority

In terms of cuts, those at Director level are most likely to have been impacted. 46% have had salary reductions (vs an average of 31% of respondents) and half of those with cuts, have had cuts of 20% or more.

Career level	Cut 1-10%	Cut 11-20%	Cut 21% plus	Total cuts	No change	Increase	N/A
Support	11%	11%	4%	26%	59%	7%	7%
Practitioner	4%	6%	18%	28%	64%	0%	8%
Manager	2%	13%	8%	23%	69%	1%	8%
Head of function	4%	12%	13%	30%	70%	0%	0%
Director	6%	16%	24%	46%	53%	1%	1%
<b>Total</b>	<b>4%</b>	<b>12%</b>	<b>14%</b>	<b>31%</b>	<b>61%</b>	<b>1%</b>	<b>4%</b>

#### Coping overall

When asked how are you coping overall, respondents gave, on average, a score of 7 out of 10.



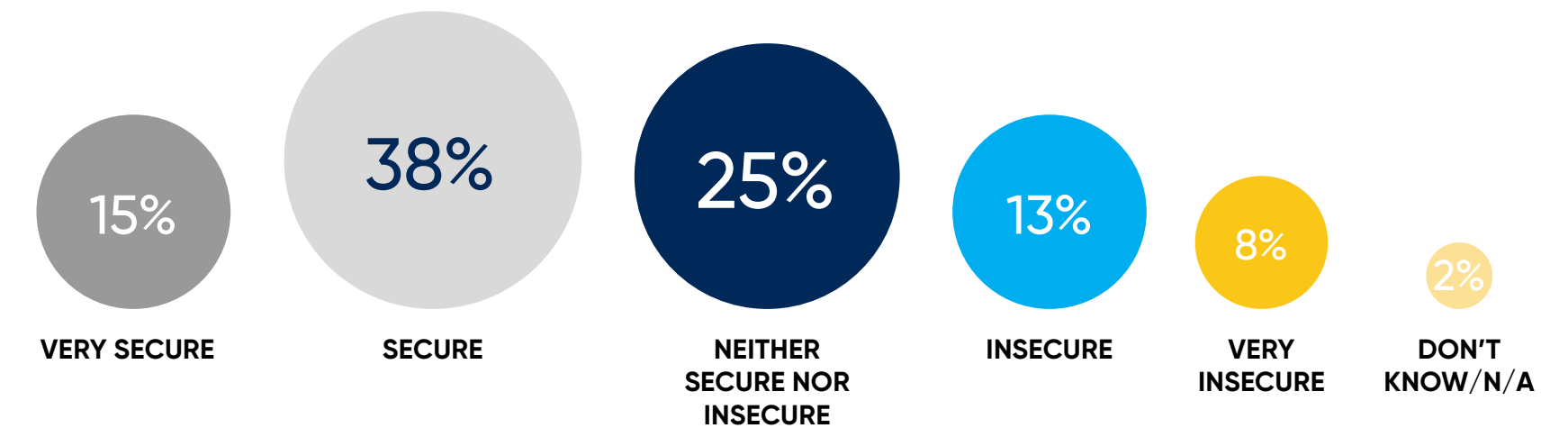
This demonstrates the resilience, adaptability and positivity of the community, even under unprecedented conditions.

#### Level of security in current role

Compared to our annual salary & sentiment survey carried out just 9 months ago, when 71% felt secure or very secure in their role, just **53% feel secure** now. Those working in the government, financial services, education, agri, FMCG and utilities sectors feel most secure.

**21% feel insecure**, double the level of 9 months ago. Those least secure are from the hotel/tourism, NFP and media/publishing sectors. Those working in small companies feel more insecure too- 28% vs 15% of those in larger companies.

Those at early career stage are really feeling the impact of the crisis and feel the least secure (only 33% vs 53% total feel secure), vs 61% of senior respondents.



## 4. marketing role focus during crisis

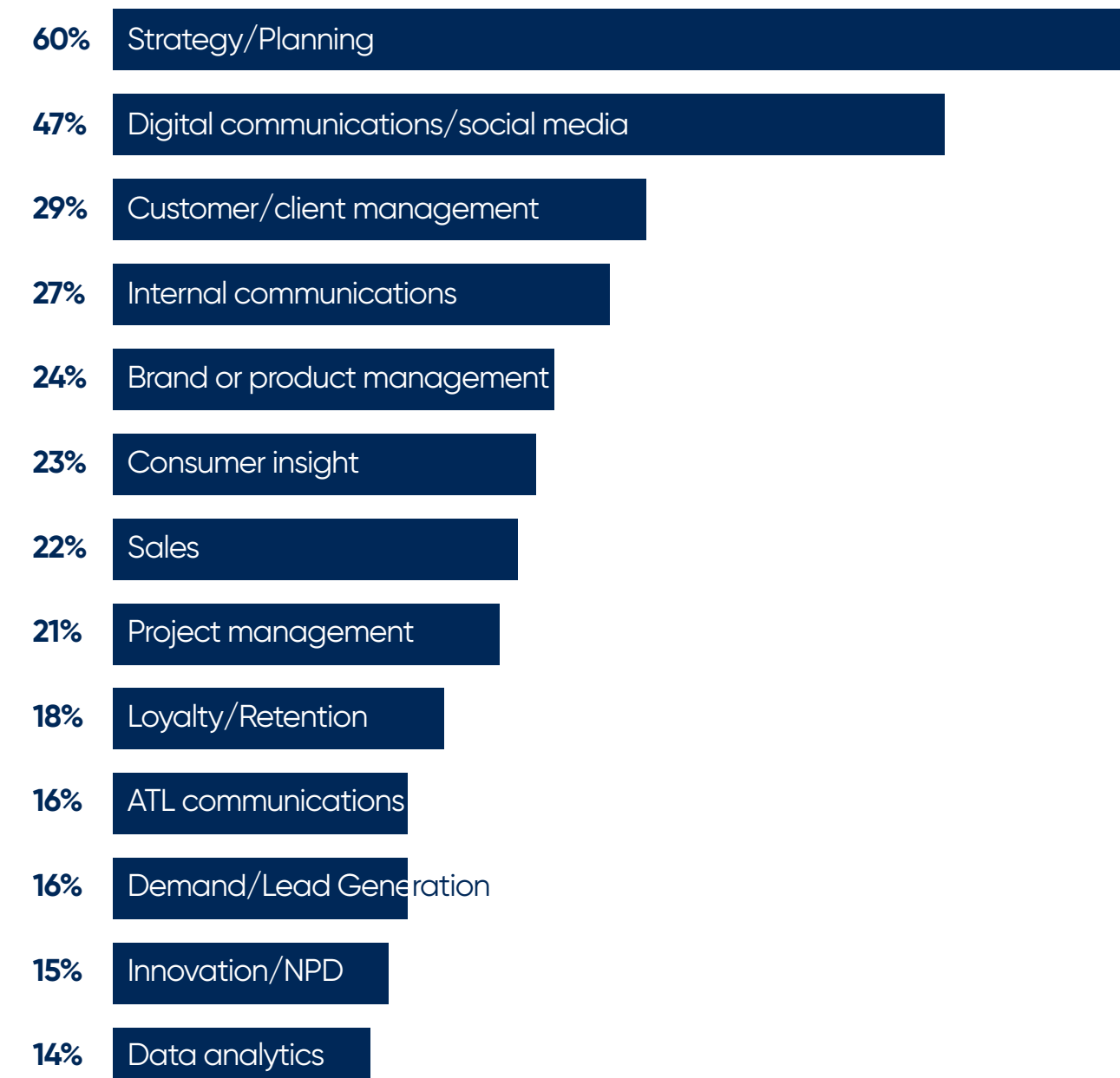
We look at the changing role of marketing during this crisis and how businesses are supporting their teams.

78% of respondents said their role had changed somewhat or a lot as a result of the crisis.

### If focus of role changed during this crisis



### Top areas of focus currently



With such a rapid and unprecedented change, marketers have been focused on adapting strategy and plans, as well as communicating with key stakeholders, both internal and external.

From feedback in our survey, there are **5 key themes** emerging, in terms of this changed role:

#### 1. Marketing resources, and senior people in particular, are focused on Covid business response, in 3 key areas:

**Immediate Crisis management.** Many have been co-opted onto Crisis Management teams, focusing on business issues as well as on working practices and communicating to employees.

**Shorter term planning and activities.** Mitigation of covid impact, re-setting budgets, move to more tactical activity and updating plans. Helping across the business on very specific, often new projects.

**Longer term strategy.** Adapting and pivoting strategy, focusing more on post Covid growth opportunities, new markets, portfolio rationalisation.

#### 2. Cash, Revenue & Customer focus

Massive focus on the customer, revenue generation/on sales and retention. More frequent sales forecasting & reporting. Focus on cash management as well as on cost reduction.

#### 3. Moving business model online

Many respondents were exploring how their business moves online, manages customers online, engages with them.

#### 4. More Comms/Internal comms/digital online.

A lot more or a complete focus on digital and online. Many feeling that the overall marketing approach and style of comms has changed or will change. More emphasis on both community and communications. Looking at speed and impact of delivering content online, rather than face to face. Adapting comms, especially events, to webinars.

Internal communications will be more important. In general, strong comms and marketing will be key to business recovery.

One comment summarised this move to online comms well: "Focus is on driving both employee and customer engagement online. This has included recording online videos such as fireside chats, wellbeing initiatives, weekly news bulletins in TV news style, hosting virtual workshops of groups of staff and customers to improve service and enhance our service through reworking our a service charter to reflect both virtual and physical engagement among many other things... it's extremely busy".

#### 5. Added workload & more complex, remote team management

Additional responsibility and workload, all in the context of increased complexity of working remotely, more calls/communications. Far more team management, coaching, team support and reporting and looking at new ways of working.

Shift (significant) to working remotely, to adjust brand and CX strategies.

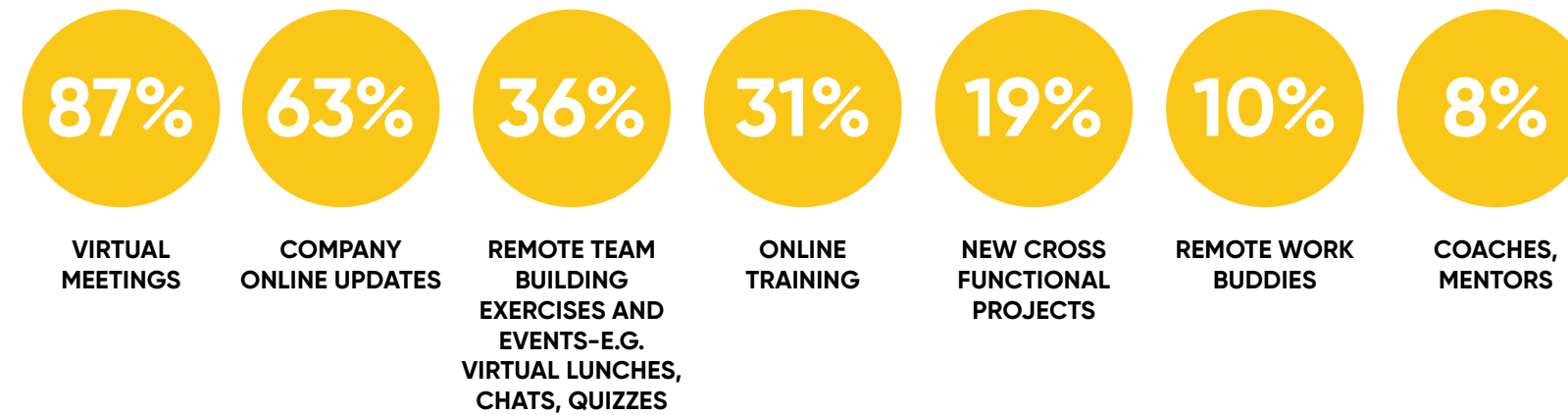
Responsibility for other new areas outside of marketing.



## 4. marketing role focus during crisis

Businesses also are adapting how they manage and support their employees.

### How your business communicates with and supports you in these circumstances



In addition to email, companies have certainly moved online, with both virtual meetings and company online updates.

### Impact on team morale and productivity

	Agree	Disagree	Neither agree nor disagree
Team morale is good now	37%	33%	30%
I feel I know my colleagues better now	26%	26%	48%
I am more productive now	35%	33%	32%
My team is more productive now	26%	33%	41%

Team morale is holding up given the circumstances. Both support and director level feel it is better than others.

The verdict is out on productivity. At all career levels, respondents rate their personal productivity considerably higher than that of their team's, with average personal productivity at 35% compared to an average team productivity of 26%. Heads of function in particular feel more productive now (43%).

Directors feel they know their colleagues better now.

### New employment opportunities

#### Exploring future marketing job opportunities

Type of opportunity	Hiring	Not hiring	Don't know
Permanent recruitment	19%	63%	18%
Contracting/Consulting	19%	55%	26%

In terms of new opportunities becoming available, the market has massively contracted in a matter of weeks. Almost two thirds of companies have put recruitment on hold and over half see less contracting/consulting opportunities. Companies may be open to contracting and consulting solutions before taking on new full-time hires.

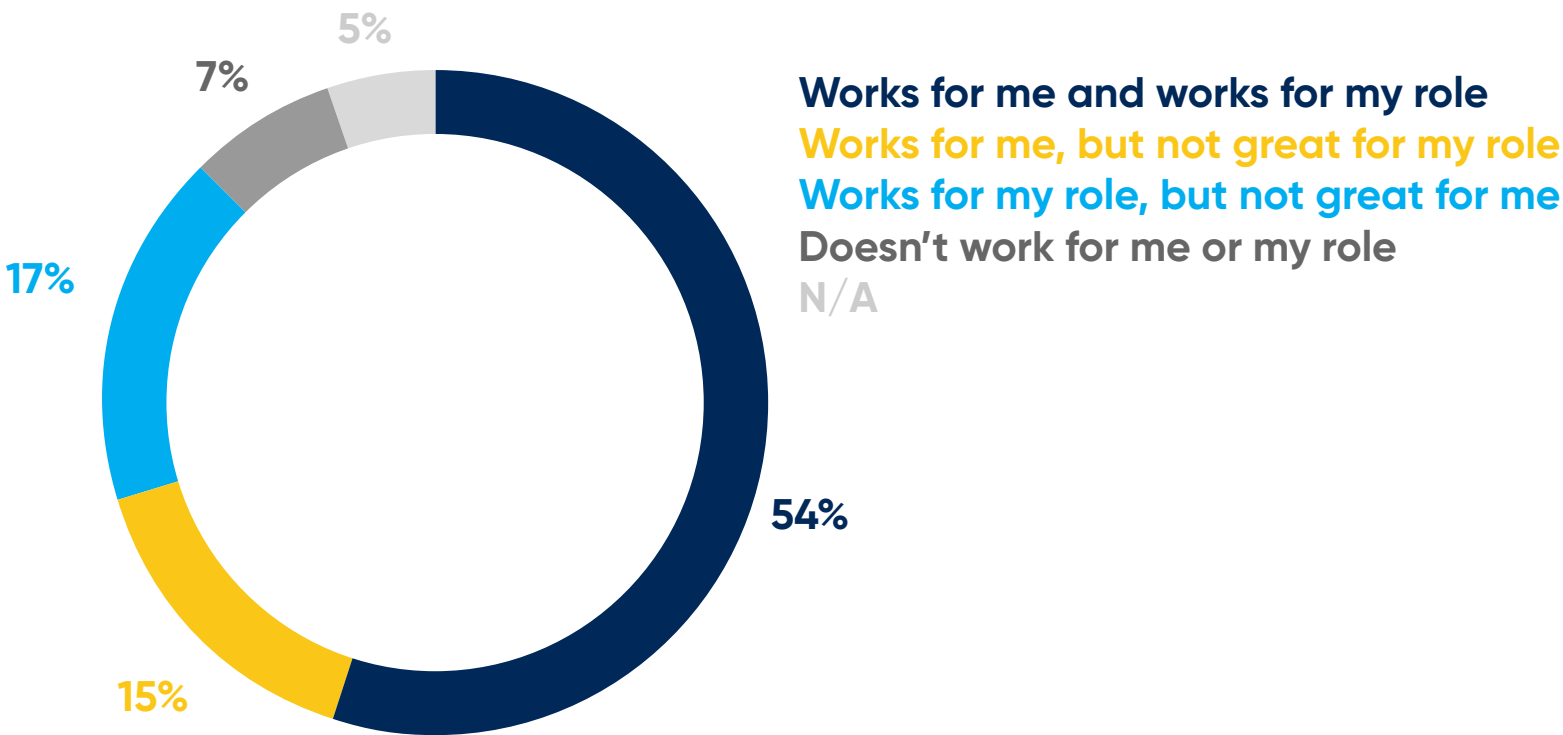
More senior respondents are more pessimistic about hiring and are maybe closer to the plans.

FMCG, financial services, telco, government and healthcare sectors are more likely than others to be in hiring mode. Additionally, agencies, education and professional & business services sectors are likely to be more open to consulting/contracting than permanent recruitment now.

# 5. personal impact

Here we explore how the crisis has impacted people personally and if working from home (WFH) is working for them.

## How working from home is working

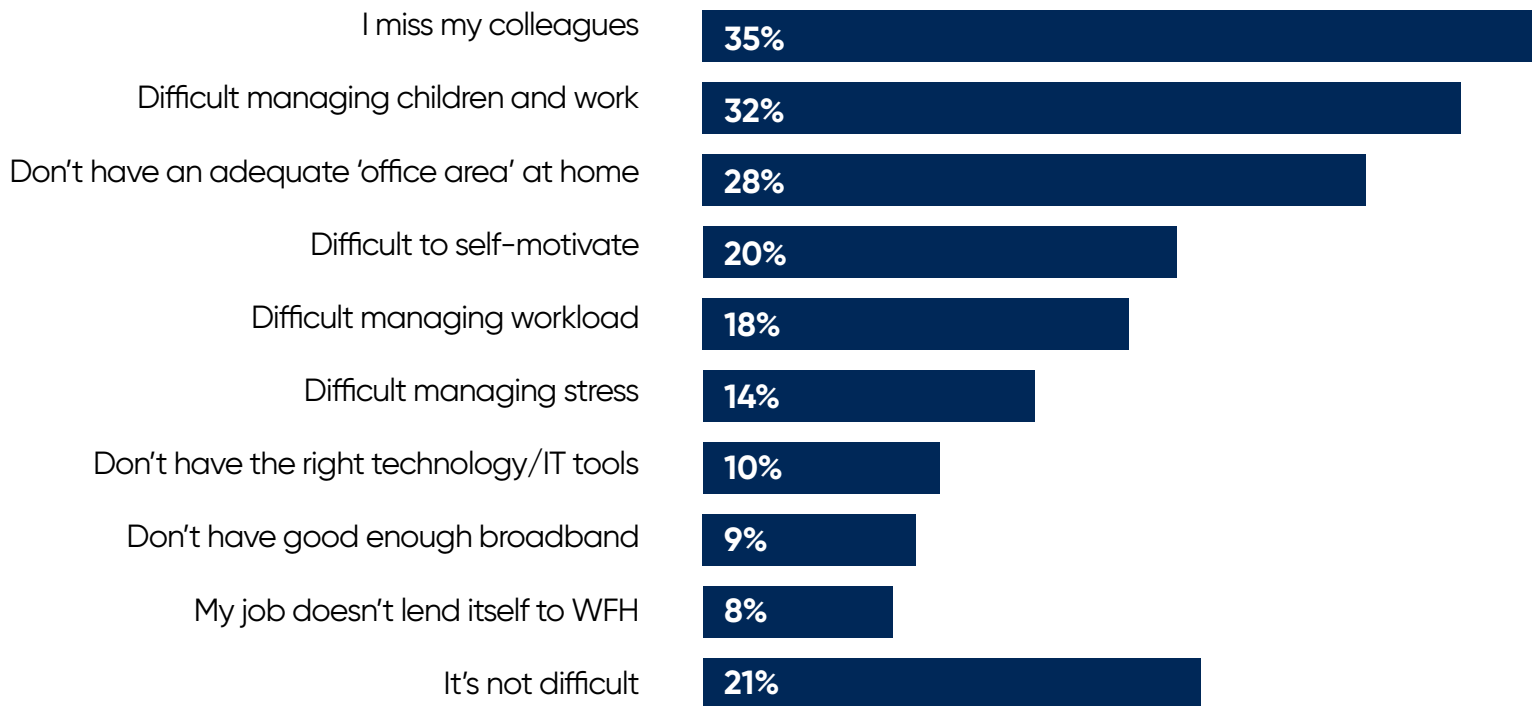


Working from home in general is working well for people. Only 7% say it doesn't work either for them or their role. This is likely to have real implications for how people wish to work once this crisis has passed.

WFH works better for female respondents (59%) than male (48%). 19% of males feel it works for them, but not their roles, vs 13% of females.

Where it doesn't work, it's because people miss their colleagues, find it difficult to manage children and work and because of office set up limitations.

## Difficulties working from home



A third of all respondents from practitioner level up are finding managing children and work difficult. Gender plays a role, with 36% of female respondents vs 29% of males finding managing children difficult. Females are also finding it more difficult to manage stress -16% vs 12% of male respondents. 39% of all mid-career level respondents are finding it more difficult managing both kids and stress.

Everyone misses their colleagues, in particular those at manager level, who may find the workplace a release from the above-mentioned child/work/stress issues at times. Female respondents miss colleagues relatively more.

Those who are more junior in career, who might be new to the workplace, find it most difficult to self-motivate, and are most likely to feel that their job doesn't lend itself to WFH. They are also those who feel they don't have an adequate space for a home office, as they are more likely to be living at home with working parents or in a flat share, where competition for space can be high.

33% of male respondents, vs 26% of females, cite the lack of office area a key difficulty.

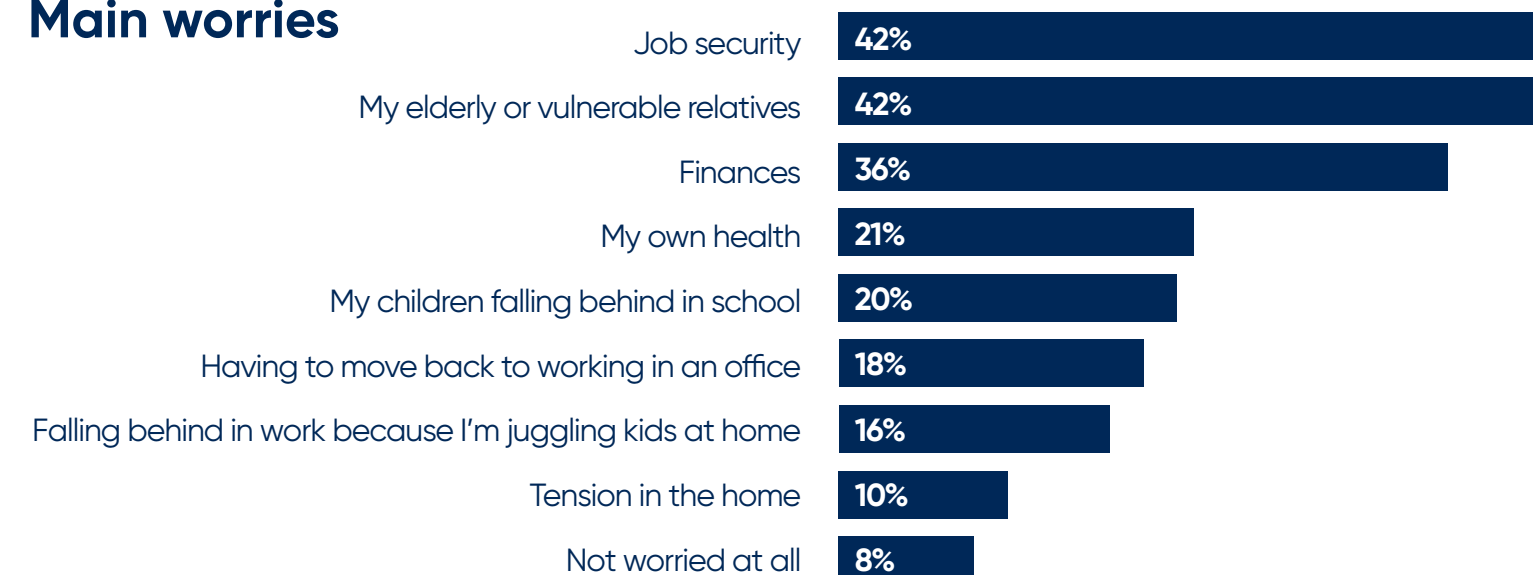
Other than missing colleagues 29% of the most senior respondents find no difficulty working from home at all.



## 5. personal impact

We explore the key concerns of the community and how they are motivating themselves and managing their wellbeing.

### Main worries



Job security and finances in this uncertain time are key worries for respondents. 54% of those at support and practitioner levels are most worried about their job security. Both the most junior (54%) and most senior (38%) are most worried about their finances and 41% of male respondents are worried about finances vs 34% of females.

That of health- both of those close to them and personal health- are understandably key worries too. Earlier career stage respondents are relatively more worried about their own health.

All are more worried about the health of elderly or vulnerable relatives, than their own, in particular more senior level respondents (45%). This is a particular concern for female respondents, 49% of whom are worried about the health of vulnerable relatives vs 31% of males.

Relatively more males are worried about their children falling behind in school than females (26% vs 17%). More females are worried about falling behind in work, because of having to juggle kids and work (19% vs 11% males).

In addition to the above, many voiced concerns for the overall economy and society. How it will be impacted longer term and the fall out on jobs, livelihoods, families, as well as the long-term effects on physical and mental wellbeing. Several were also worried by not knowing how long this crisis will last, and indeed, when it is "over", what the "new normal" will look like.

When most of the talk in the media is about difficulties WFH, almost one in five are actually worried about having to go back and work from the office (21% of female and 14% of male respondents), an interesting development.

### Keeping motivated and feeling good, for your physical and mental wellbeing



Video contact and exercising more are the key ways in which the community is keeping motivated and feeling good. Nice food and drinks treats are also helping. Interesting to see that 39% are keeping positive by participating more in online learning and webinars.

Respondents added that they are reading more, gardening more and doing a lot more housework and home DIY jobs. Several say they are meditating and doing yoga.

#### Relative to others how do they keep motivated and well

From more junior career level (presumably/typically younger), to more senior career level (presumably/typically older):

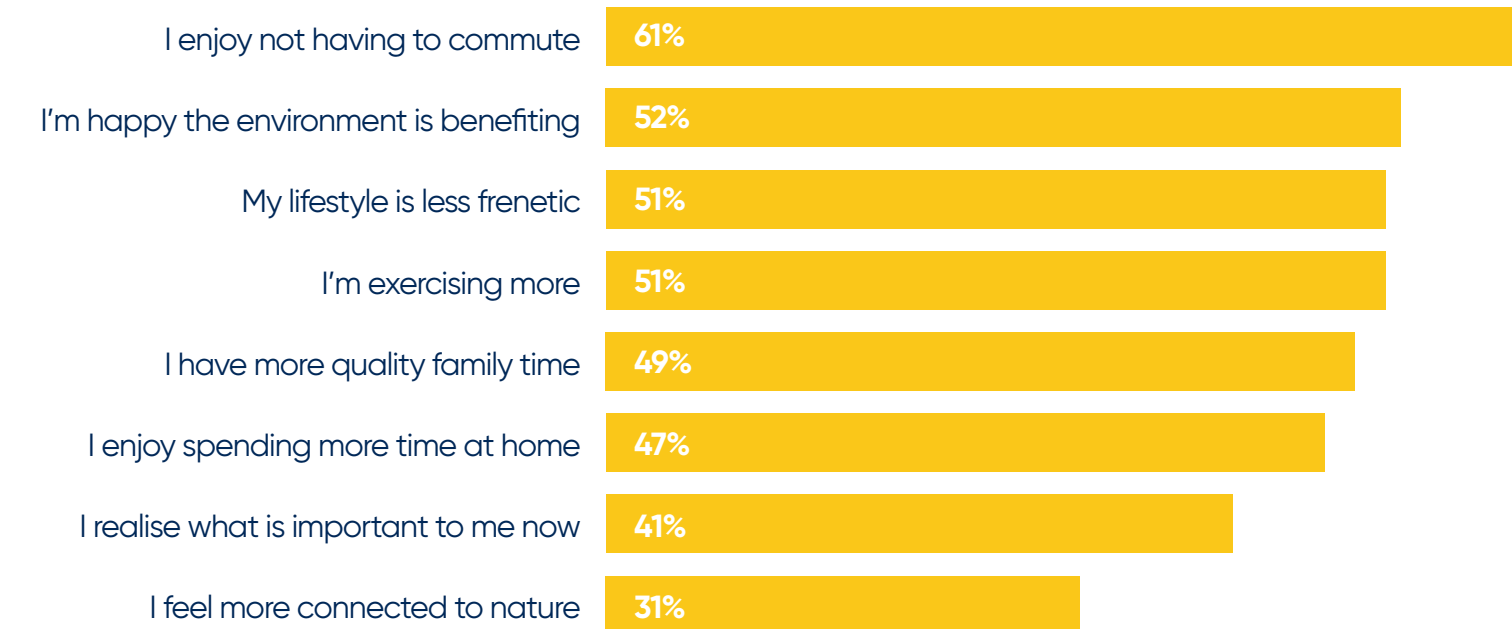
- **At support level:** Less food and drink treats, more online games and online learning
- **At practitioner level (4-9 years into career):** More helping of elderly family, helping of elderly neighbours and more community care, as well as food and drink treats
- **At manager level:** More contact with family and friends online, more food and drink treats and more online learning
- **At head of function level:** More exercise and more food and drink treats
- **At director level:** More exercise, more online contact with family and friends, more helping elderly relatives and neighbours.

**Female respondents** are much more likely to turn to food and drink treats (47% female vs 31% of male respondents), to stay in contact with family and friends online (80% vs 70%) and to partake in online learning.

## 5. personal impact

In all of this, there are positives ...

### Positives for you in this crisis



Less commuting and a less frenetic pace of life, with more family and home time and more exercise, the resultant upsides for the environment, are key positives for marketing community respondents.

Male respondents are, relatively speaking, enjoying quality family time more and exercising more. Females say they are enjoying a less frenetic lifestyle and relative to male respondents are feeling more connected to nature.

Those with no children or older children are, relatively speaking, enjoying exercising more; those with children are appreciating less commuting and spending more time at home. Earlier career stage respondents are appreciating nature more.

### The future

The desire for these positives to continue will undoubtedly shape employee expectations going forward. Several said that a positive impact was businesses being forced to embrace new ways of working.

The proven ability and coping mechanisms to work from home will drive demand to do so. Yet the home will not replace the office. The human need to connect outside the home as well as within is strong. Not every role nor every person is suited to home working. However a new working mix that provides a new balance is likely to attract, motivate and retain the best.

New ways of working are also likely to be embraced, with companies likely to be more open not only to new ways of working, but also to flexible access to talent.

Companies will need the core skills of marketers- their customer insight and focus, their strategic planning capability, their communications and digital capabilities, amongst others- to drive this change and future growth.

Above all they will need the resilience and ability of marketers, to cope, to adapt, to lead and to perform as evidenced in this Pulse Survey.

Alternatives will be working hard to help businesses access this great talent and to provide flexible working opportunities, to help the community drive growth in business and develop personal careers.

Please contact the team at [hello@alternatives.ie](mailto:hello@alternatives.ie) for any guidance during this Covid crisis.

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.**



# innovatives

new ways of working

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