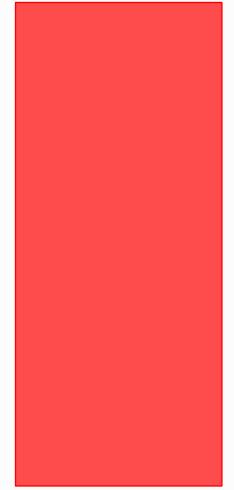


COVID-19 AND EVERYDAY LIFE

THE EMOTIONAL IMPACT: AN EARLY READ



Research conducted
March 26-30, 2020

ESL INSIGHTS

Excellence in Strategic Leadership

April 6, 2020

BACKGROUND AND METHODOLOGY



Background & Purpose

- Everyone in this country is an unwitting participant in the COVID-19 drama, an ongoing saga which is taking a physical and emotional toll on the entire nation. One of the things that became clear to us is that most of the studies to date have been quantitative with relatively little focus on the emotional impact of the epidemic.
- The purpose of this research was to explore the emotional impact of this crisis; what are their biggest worries of everyday people, how their daily lives have changed, how they are adapting to “stay at home” restrictions and social distancing.
- We also wanted to understand how they envision their lives changing, what are they looking forward the most, what are they most grateful for and how they see the future once this crisis is over.
- One of ESL Insights’ areas of focus is in the Boomer generation and the 50+ population. In this study, we purposefully reached out to older consumers who have been identified as an “at risk” population for COVID-19. Therefore, consumers over 60 represent two-thirds of those we interviewed.



Method & Sample

- The study utilized was a qualitative online survey consisting of 10 open ended questions.
- We also collected a few demographics: Gender, age, # of people in the household, # of children under 18 and state.
- Questions were purposefully structured as open ends to encourage participants to share their feelings and opinions and elicit more in-depth comments.
- The study was conducted from March 26 through March 30, 2020.
- There were 100 participants:
 - The sample skewed female (79%), older (64% were over 60, the “at risk” group we were targeting) and urban, with almost half representing the New York Metro Area.
 - 81% had two or more people in their household and 10% had children under 18 living at home.



Reporting

- Reporting consists of Key Takeaways and Detailed Findings for each of the ten questions.
- Illustrative quotes are included for each question to “flesh out” the key themes. These quotes represent the most prevalent comments as well as a few that are more atypical to show the range of opinions and experiences.
- The results are presented in aggregate for all the 100 participants and are not broken down by gender, age, region or # in household.
- In reviewing the individual results, no specific or consistent differences emerged by gender or age that would merit a demographic breakdown of the findings.

THE NEW WORLD OF COVID-19



Fear

A Better
Future

Disruption

Gratitude

Friends &
Family

Adapting

SUMMARY OF KEY LEARNINGS

1. **Fear** is the overriding sentiment among those we interviewed.
 - This is even true of those who say they are “fine”
 - At the moment, they are worried more about their own personal health and safety – and that of their family and friends – than about the economic impact of COVID-19
2. The need to Shelter in Place and for Social Distancing has caused **Disruption** in most people’s Daily Lives
 - They are yearning for a better time when they are able to meet face-to-face with family, friends and work colleagues.
3. The social support of **Friends & Family** is of primary importance
 - Technology has been adopted by people of all ages in keeping social channels open
 - Though it’s also recognized as not being a true replacement for in-person contact and human touch
4. Most are **Adapting** surprisingly well to “stay at home”
 - Almost all recognize the need to protect themselves and society and are *willing to do what it takes*
5. Most express **Gratitude** for the things they do have, especially their health
 - They also express concern for those less fortunate and would like to help
6. Most are looking forward to **A Better Future**
 - Many express hope that this crisis will result in a more just and better world
 - They also envision themselves making positive changes in their lives

KEY LEARNINGS DETAIL

Fear

For their own safety, and the safety of family & friends

- The primary fear is that they or a loved one will get the virus and not survive, which is fueled by images of people dying alone in hospital tied to a ventilator
- Fighting an “invisible enemy”
- Worry about the short-term and longer-term economic impact
- Not knowing what to expect in a global crisis for which there is no clear historical precedent

Disruption

Caused by “shelter in place” and “social distancing”

- Being confined to their homes and not being free to travel about as they normally would
- Taking their lives online, and missing the social interaction of friends and co-workers
- Not being able to do everyday tasks such as go shopping or meet friends
- Needing to find new ways of doing things: cooking, exercising at home, online entertainment
- Constantly being vigilant not to bring the virus into their homes, including hand washing

Friends & Family

Combating social isolation

- Staying connected is of paramount importance
- Yearning for in-person social gatherings
- Testing the limitations of technology in bridging this gap
- Missing physical contact such as holding their grandchildren or hugs from friends

KEY LEARNINGS DETAIL

Adapting

For their own safety, and the safety of family & friends

- Have accepted and support the need to shelter in place
- Walking outside has taken a new importance
- Work appears to be secondary to personal interaction
- Yearning for normalcy and for getting back to a normal life

Gratitude

Caused by “shelter in place” and “social distancing”

- Financial security is a source of gratitude for those who have it
- Appreciation for the things they do have: their home, their family and friends, their faith, technology, their pets, nature, and the healthcare workers on the frontlines
- Concern for those less fortunate: the poor, the homeless, the unemployed, those whose jobs require that they work face-to-face with people

A Better Future

COVID-19 as a catalyst for needed change

- Convinced that we will get through this crisis and the challenges we face
- Hope for a better world based on learnings from the COVID experience
- Envision a decline of consumerism and more concern about those less fortunate as well as other social and environmental issues
- Re-evaluating what is important in their own lives and the need to change post-COVID

IMPLICATIONS

This research has uncovered a number of guidelines for engaging your customers and for overall positioning of your products and services:

- Don't stop your the digital and advertising content, even if it doesn't look as professional as usual. Your brand needs to be top-of-mind-positively and authentically.
- Consumers are looking for comfort and to be nurtured. Your marketing messaging needs to feel like “comfort food,” warm and loving.
- Consumers want authenticity. They want to know that you care about them and their families and how you are supporting the battle against the invisible enemy in their communities and how you are being socially responsible.
- They are looking for safety and reality. The world they knew has been turned asunder. If you are selling products or providing services online or using your brand for business and personal connectivity, they want to know that you have taken every possible measure to secure their connections and online communities.
- Consumers are very concerned about their health and the health of loved ones. If you can authentically do it, help consumers believe that they can reach that uncharted, better future with the people they love. Help them stay healthy.
- Use this opportunity to foster community through your marketing and messaging. Consumers greatly miss the belonging and security that community provides.

Detailed Findings

A DEEP DIVE INTO THE COVID-19 MINDSET

THOUGH SOME HAVE REMAINED CALM AND UPBEAT IN THE COVID-19 STORM, THE MAJORITY OF THOSE WE INTERVIEWED APPEAR TO BE SUFFERING EMOTIONAL DISTRESS

- The majority of survey participants say they feel anxious, afraid, panicked and worried.
 - Though a few report they are calm, fine, positive and optimistic about the future.
- Many appear to be worried about the future.
- Some express both positive and negative feelings; that is feeling anxious and worried but also grateful and hopeful.
- Many express gratitude for what they have. Grateful, fortunate for being healthy, having a job and financial security.
- Boredom, isolation, and unease are also mentioned.
- A few mention that they are enjoying the time at home, or at least are very content to be there.

Q1: In thinking about all that has happened over the past 2 weeks, how would you say you are currently feeling?

“

Isolated and a little bored, grateful that my health is good, grateful that I can go outside and walk with friends....

I am frightened for myself, my family and the world. I feel somewhat insecure about our future. That said, I am hanging in there and trying to create a "normal" to sustain for now.

I am feeling a mixture of being overwhelmed, grateful I can work from home and stay safe with my family, and exhausted from working full-time at home while managing two kids. I also feel hopeful in humanity and that we will ban together to get through this,.. but frustrated at those who do not listen to social distancing recommendations.

Generally frightened and often panicky.

I'm feeling worried and afraid to get the virus.

I go in swings. Worried and anxious about the economy and my local proprietors who are now out of business, to gobbling up the family time, and embracing the new norm.

Very grateful to be alive and in the country. Trying to stay happy, upbeat, hopeful, positive. Occasionally fear and anxiety in the evening. –

Fine – Multiple mentions

I'm feeling great, love seeing families out walking, jogging, biking. The new opportunities are endless.

I'm feeling nervous and fat and a bit bored, but mostly I'm feeling quite content in my little cocoon!

”

WHEN ASKED ABOUT THEIR GREATEST WORRIES, THE IMAGES PLAYED BACK WERE LARGELY APOCALYPTIC – SICKNESS, RESPIRATORS, DEATH, ECONOMIC SURVIVAL – THOUGH SOME ARE WORRIED ABOUT THE FUTURE IMPACT ON THEIR DAILY LIVES

- The overarching worry is around health with many playing back images of themselves dying alone, in hospital, and on a respirator.
 - This worry extends to family and friends, particularly among those who have elderly parents or spouses.
- Second is the economic impact of the virus, particularly as it relates to the economy overall and the impact on retirement savings as well as the potential for high unemployment and small businesses collapsing.
- The third worry is that an overwhelmed medical system will not be able to cope with an exponential increase in cases as the virus continues to spread across the country.
- Other concerns are around:
 - The community as a whole, especially poor people, the unemployed, those in jails, and the homeless.
 - Their own mental health
 - The challenges of homeschooling their children
 - Politics: how the government is responding and Trump being re-elected
 - Their future and what it will look like: the new normal and how life will change

Q2: What are the top three (3) things you are most worried about?

Q3: What is your greatest worry and why is that?

“

The number of deaths that will occur Getting sick - myself and/or family Terrible economic impact on Americans (and globally)....

My health and health of my loved ones and friends. The state of my country. The suffering of so many people.

Rapid spread of the virus; deaths from the virus; response not fast enough.

Getting sick, limitations on travel, having to change my entire lifestyle indefinitely.

Small businesses not being able to make it Drag on the economy Stupid and inept political decisions.

Our country going into a terrible economic depression, getting sick from the virus and ending up in a hospital on a respirator, my loved ones getting sick and same result.

Getting sick. Not being able to feed my children. Not being able to work.

Getting sick; getting sick; getting sick..

The health of my family and myself and inadvertently contaminating someone else. The government failing to protect us. The financial hit on our retirement savings.

Staying in contact; friends and family health; economic survival two months from now.

My greatest worry is the damage to the lower and middle classes. I have no faith in this government's ability to respond.

I worry about my husband and him remaining virus-free because as an MD, he is on frontline every weekday and on weekends, when he's on call.

Negative impact on US economy-----long term impact.

Losing my mind due to the social isolation. .

”

WHILE THE NEED TO STAY HOME IS UNIVERSALLY ACCEPTED, THE IMPACT ON DAILY LIFE IS FELT MUCH MORE ACUTELY BY SOME PARTICIPANTS THAN OTHERS.

- Many of those we interviewed are fine with the need to stay home, because it differs little from their lives pre COVID-19. They either normally work from home or normally spend the most of their time at home.
 - Most understand the need to stay home and are willing to do it because they believe it is essential to protect the community and stop the spread of the virus.
- But some are finding that being confined to their home is causing them to feel isolated, depressed and anxious.
- Many mention that being able to go outside for walks and exercise helps them maintain balance in their lives as well as providing physical benefits.
- Many mention that they miss their regular activities like going to restaurants, gym, seeing friends, going to local stores
- They are spending more time online, on the phone, staying in contact with friends and family, reading, catching up on DIY projects, cooking and working from home.
- A few mention the need to maintain a daily structure and engage in healthy behaviors during this period.
- Those whose job requires them to be with others appear to be making the best of their situation, including taking greater precautions than usual.

Q4: How do you feel about being restricted to staying at home and limited on where you can go outside?

Q5: If you are NOT able to isolate due to the nature of your job, how are you coping?

“ We have isolated for about 10 days with no plans for ending it. In some ways it has been nice, comforting, and loving (dog and husband). We want to be good citizens and are willing to adjust our lives to protect ourselves and others.

I miss seeing my friends in person; however, I am able to work from home and my spouse is here, so it's not really bad for us. I am fortunate.

I am completely ok with it. I think we should all do it to help flatten the curve.

Lots of DIY projects being done.

Not too bad... like being home most of the time .

Hate it. We go out for fresh air, walks, bike/scooter rides as much as possible.

It's very tough!!! I feel anxious and stressed.

Very isolating. I am alone. Thank goodness for my dog.

It's hard. But as long as I can get out and go for a walk, I'm making it work.

Adapting and adjusting. Moving from unhealthy coping behaviors (food, drink, etc.) gradually to more healthy coping behaviors (exercise, playing music, healthier eating, loving connection to spouse)..

Keeping organized; keeping to a schedule; being rigorous about exercise and nutrition..

It's getting to me. It's causing me to be depressed. –

Fine (with being at work), all things keep moving forward no matter what.

At work, since I work in the health field, I attempt to stay at least 6 feet away and practice social distancing.

”

AS RESTRICTIONS IN THEIR DAILY LIVES INCREASE, PARTICIPANTS REPORT CREATIVE WAYS OF MOVING ACTIVITIES ONLINE AS WELL AS CHANGES IN WHAT THEY DO ON A DAILY BASIS

- Although many of those we interviewed say that they miss their daily routine, they also have found creative ways of moving what's important to them online.
 - This includes work, socializing, schoolwork, teaching, having drinks with friends, cultural activities, learning, exercise classes.
 - Some say though that online is not quite the same.
- Many report they are cooking, both as a necessity and also because they have the leisure to make more complex meals than usual. (Though not the same for many as being able to go out to restaurants.)
- A large number are happy to have time to catch up on things they enjoy and never have the time to do otherwise: reading, house projects, walks, fun television shows, cleaning as well as enjoying having the luxury of “dressing down” .
- Many appear to be grateful to have the time to reach out to and connect with friends and family.
- Some appear to be glued to the news more than would be the case otherwise..

Q6: What are you doing differently? what are you doing instead of your usual routine?

“

Meeting people on Zoom instead of face-to-face; cooking or ordering in instead of going out for dinner; attending classes and lectures online instead of in person; exercising on my own instead of going to the gym.

I am reading more; I wake and can have my devotional before getting out of bed or starting my day. I am taking classes online which I have wanted to do.

Working from home. No travel. Shut in. Making nice meals at home instead of grab and go.

Everything is different. I usually commute, so now I am teaching from home. I (normally) go out a lot, visit museums, go to plays and dinners etc. Now all my cultural and social activities are online

Cooking. I find I have more time for leisure activities and organizing my life -- tasks that have been neglected due to business.

Spending more time on computer doing things online, reading articles. Connecting more with friends through What's App, text, Zoom. Eating all meals at home.

More fun tv shows, more reading, more bird watching in my back yard, more playing guitar, more fun connection with my spouse.

I haven't been getting dressed and wearing makeup but have been doing a deep cleaning of my house.

Lots of Zoom meetings, doing yoga at home, long walks

Not socializing. Miss usual activities and exercise..

Cooking, Dressing in sweats daily. Reaching out more often to friends and family.

”

VERY EARLY INTO COVID-19, REACTIONS AS TO HOW LIFE WILL CHANGE ARE BOTH POSITIVE AND NEGATIVE, WITH MANY EXPECTING THAT IT WILL CONTINUE AS BEFORE

- Early in this process, many of those we interviewed are convinced that their post-COVID life will go on as before and that all will “go back to normal.”
- Many are looking for “silver linings” to this experience in terms of:
 - Spending more time with family and friends, staying connected, being grateful for what they have, appreciating their health, family and life.
 - Continuing new activities and good habits acquired in this period: taking more walks, exercising more, eating healthier, washing hands more often.
 - The increasing number of things that will be done via technology.
 - Being optimistic about the future and that the world will be a better place.
- Many believe their lives will change in terms of:
 - Being more cautious, avoiding crowds, not shaking hands, keeping social distance, shopping online.
 - Being afraid about traveling, going to restaurants and so on.
 - Real financial pressure stemming from job loss, losing money in their investments, and not being able to retire.
- Others say it’s too soon to know how the world and their life will change.

Q7: When this crisis is over, how do you envision your life changing?

“

Back to normal routine, traveling, restaurants, social life, etc.

I do not envision my life changing.

Resume life as before but still being much more cautious.

Hopefully less consumerism.

I will make decisions and refocus all that I do with the knowledge and appreciation that we are all being given a wake-up call, or a second chance, both collectively and as individuals.

Being more grateful for the little things, being able to go to the store, travel, see my parents, and grateful for my children's school.

Not sure. Just look forward to having our normal lives back.

I will be much more appreciative of all that I have, especially my good health.

I'm not sure. I suspect that I will hold my friends and family closer. Talk and see them more often. Keep needed supplies stocked in my home..

There will be a lot more being done via technology. I also think I will end up being more cautious around ill people.

I definitely see myself being more open and social with friends and family..

I think I will be more of a saver and not spend so much on things.

Will be more frugal because of the financial losses; will avoid crowded places; will stay more in touch with friends; will shop more online.

I imagine there will be some financial restraints - will have to tighten my belt - I hope that is all.

I will probably entertain more at home, eat more healthily, spend less and save more.

”

THEY ARE MOST LOOKING FORWARD TO RETURNING TO A NORMAL LIFE WHERE THEY CAN BE WITH FAMILY AND FRIENDS AND HAVE FREEDOM TO MOVE ABOUT

- Despite their ability to connect with people via technology, those we interviewed are most looking forward to face-to-face interaction including:
 - Spending time and socializing with friends and family.
 - Working face-to-face with colleagues.
 - Being able to touch (hug) others.
 - In-person gatherings.
 - Being able to go out to restaurants.
- Being able to move about freely is also something they are look forward to as they return to a more normal existence:
 - Being able to talk walks.
 - Going to the grocery store without fear (and seeing stocked shelves).
 - Being able to travel freely.
- Other mentions are around the precautions taken to reduce spread of the virus especially hand-washing.
- Some express curiosity to see what this new post-COVID world will look, and the differences in how people live their lives and what they value as important.

Q8: What are you most looking forward to when the crisis is over?

“

Resuming a normal life.

Seeing family and friends in person and resuming our travels.

Hugging my son!

Going to the grocery store without fear and seeing stocked shelves without worry about food or items being in the store

Freely connecting with people and going out, being social

Spending real time with kids and grandparents.

Not having to wash my hands so often Not having to worry about food and toilet paper.

Being able to socialize with friends and relatives. Dining at restaurants and entering retail establishments without hesitation.

Being able to hug my friends and not have to social distance

Taking walks around parks and having an active life outside the house.

Socializing with family and good friends. Eating out again.

Human contact! Gatherings with friends & family.

Parks opening, more people outside, back to work in face to face situations.

To see the global reset, what will be the major paradigm shifts, what will be the new norm. Will people begin to see the busyness they once lived be something they won't want to go to?

”

SURVEY PARTICIPANTS ARE MOST GRATEFUL FOR THOSE THINGS THAT MEET THEIR PHYSIOLOGICAL, SAFETY, AND LOVE AND BELONGING NEEDS: THEIR HEALTH, FINANCIAL SECURITY, THE ABILITY TO CONNECT WITH FAMILY AND FRIENDS

- Those we interviewed are most grateful for their own health and for the health of their family and friends. Many specifically mention their spouse or romantic partner and are grateful for their love and support.
- The second thing for which they are most grateful is having the love and support of family and friends, as well as the ability to reach out to them via technology. (Though not the same thing as being able to see them in person.)
- Those who are comfortably off financially are grateful for having financial security and no financial problems at this time
- Those who are able to work from home are grateful for having a job that permits them to stay safe while continuing to provide for themselves and their family.
- Several are most grateful for their home and the comfort and safety it provides.
- Some mention that they are grateful to have the time to pause and reflect about life.
- A few expressed gratitude for their faith and belief in God or their personal relationship with Jesus.
- Gratitude was also expressed for technology, health professionals, dogs & cats, nature and life in general.

Q9: What are you most grateful for?



I am grateful that I have my health and friends to help me get through this.

For my health, for been able to keep my job. For having a great group of support in my friends and family!

I am grateful for our comfortable home, full refrigerator, and for our dogs.

That we and our loved ones are all staying healthy as of now.

My good health and that of my family & friends. Also, the bravery of all the health care providers out there.

My family and friends. Having a roof over my head. Working from home (for now).

That I'm healthy and not financially stressed. (#63)

The people around me that although I can't touch them, I can still reach out to. It also great to see so many people I haven't heard from in years reach out. If nothing else may be I will come out of this with some renewed friendships. Other things that make day to day life in isolation more bearable my dogs, and Kindle.

My wife and my family and the time to pause and reflect.

That Jesus is the same yesterday, today and tomorrow and that He has all of this under control.

My children, health, financial security, a home. I am grateful for my spiritual walk, the opportunity to pray in the little chapel by my home.

Extremely grateful for so much! I'm grateful this is happening at a time when our technology is so advanced. I'm grateful for so many dedicated health professionals worldwide. And, quite frankly, I'm grateful to be financially secure.



WHEN ASKED TO COMMENT FURTHER, SURVEY PARTICIPANTS EXPRESS FEAR ABOUT WHAT COULD HAPPEN NEXT, CONCERN FOR OTHERS, AND HOPE FOR A BETTER FUTURE

- No one theme predominates with sentiments falling into the following broad categories among those who chose to comment further:
 1. Fear of the unknown remains a key concern with some saying that they don't know what to believe. It doesn't help that this is an enemy you can't see, and which could be lurking in any corner.
 2. Concern for those less fortunate, especially the homeless whom many believe are a particularly vulnerable population.
 3. Recognition that we were ill-prepared to face an epidemic of this magnitude and that government has had to scramble to step up to this national emergency (both positive and negative comments).
 4. Recognition that on a personal level many were unprepared to face this type of disaster, especially those living paycheck to paycheck.
 5. Hope for a better future, both on a global and personal level resulting from a reassessment of values that comes from living through a crisis.
 6. And finally, the recognition that we will get through this and move forward, even if we don't yet know completely what this means.

Q10: Are there other thoughts you would like to share?

“ It is very hard to wage a fight against an enemy you cannot see or look at. With so many things coming at you in the media it is hard to know whom to believe or where the truth lies.

I am very frightened about what is coming next.

I am praying that this nightmare ends soon. I feel like I'm living in a horror movie, perhaps The Twilight Zone. You always have to be aware of your surroundings and continuously protect yourself from the Coronavirus that is lurking out there just waiting to attack.

I think about others in our community who are homeless and much more susceptible to disease. It seems they were the last to be considered and now that the virus is with that population, the city is trying to figure it out. Also, I would do volunteer work but if we are trying to isolate ourselves, how does that happen?

How unprepared and vulnerable the majority of people are and that so many live lives close to the edge of disaster.

We will heal from this. We will learn and grow from this.

We need a better federal government. I have a new appreciation of state and local government.

Thank you very much for trying to find out how others are handling this terrible situation. Have to understand that we are very vulnerable beings, that material health is worth nothing, that there must be a balance that allows us to live in harmony with all the other elements in our environment and that all this is based on a single word "RESPECT" and in a single teaching "LOVE YOUR NEIGHBOR LIKE YOURSELF." You have to live every day always thinking of doing good without looking at whom.

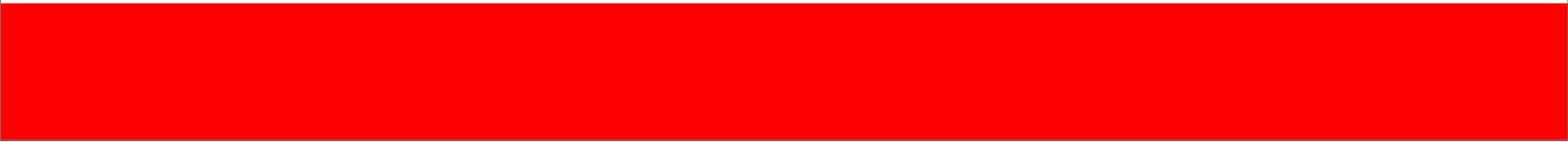
Very grateful and hoping for a global reassessment of values with less emphasis on materialism, conflict, aggression. More peace, collaboration, caring about and for one another. Empathy as criteria for success.

This is an incredible time for the majority of us to go within and reflect on our lives....and for society as a whole to make the necessary changes to heal our mother earth.

We will get through this and there will be life on the other side. It may be changed, but we will all still move forward.

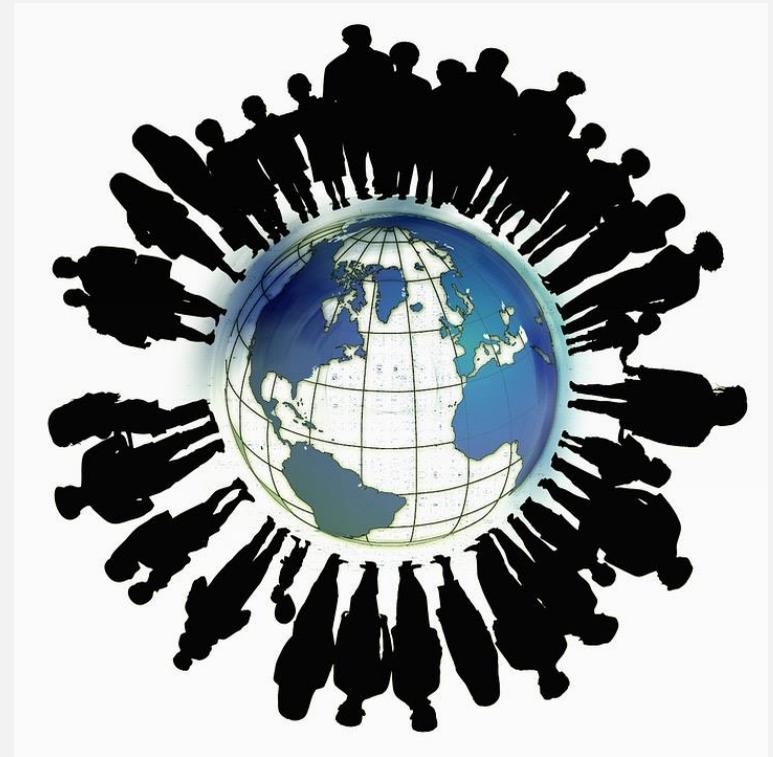
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ABOUT ESL INSIGHTS

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WHO WE ARE

- We are a research and strategy consultancy. We provide innovative marketing intelligence, strategic direction, and identify the drivers of client decision-making as companies redefine themselves in the global marketplace.
- We have broad and deep expertise in financial services, healthcare, insurance, luxury goods and services, cosmetics and health and beauty as well as experience in apparel, automotive and retail industries.
- Our principals are hands-on through every phase of the assignment providing guidance from their years of experience. We get the job done on budget and on time.
- Our Founder & Chief Insights Officer, Ellen Sills-Levy, is currently president of the Market Research Council.



WHAT WE DO



STRATEGIC MARKETING RESEARCH



WHAT WE OFFER

- ESL Insights offers a wide range of research solutions backed with broad and deep experience across a variety of industries, globally.
- Our partners are totally involved in every step of every client engagement from defining the business problem and research objectives, designing the methodology, conducting the research, analyzing results, presenting conclusions and actionable recommendations
- Audiences we study:
 - Baby Boomers and 50+ consumers
 - C-level Decision Makers in large, mid-sized and small businesses
 - Professionals and service workers
 - Hard to reach consumers
- Qualitative and Quantitative Research:
 - Focus groups – online (via video platforms), bulletin boards
 - Ethnographies – archetypes, journals and videos via online platforms
 - Individual interviews – telephone, via digital platforms
 - Online surveys
 - Telephone surveys
 - Purchase behavior surveys (moment –of- purchase mobile surveys)

THANK YOU!

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