

# How will the 2020 Census Delays Affect Marketers in 2021?



# Today's Panelists



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CMO, Leader of the Marketing & Communications Center

***The Conference Board***



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Aug. 4, 2020 Conference Board

# **How Will the 2020 Census Delays Affect Marketers in 2021?**

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# Pew Research Center

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We are a subsidiary of The Pew Charitable Trusts, our primary funder. We partner strategically with philanthropists and institutional funders who share our commitment to impartial research and data that drive discussion.

**What we do:** Generate a foundation of facts to enrich public dialogue and support sound decision-making. We conduct public opinion polling, demographic research, content analysis and data-driven social science research.

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# **CHANGING NATIONAL DEMOGRAPHICS**

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# The nation's population has changed since 2010, as Hispanics, Asian Americans and Black Americans drive growth

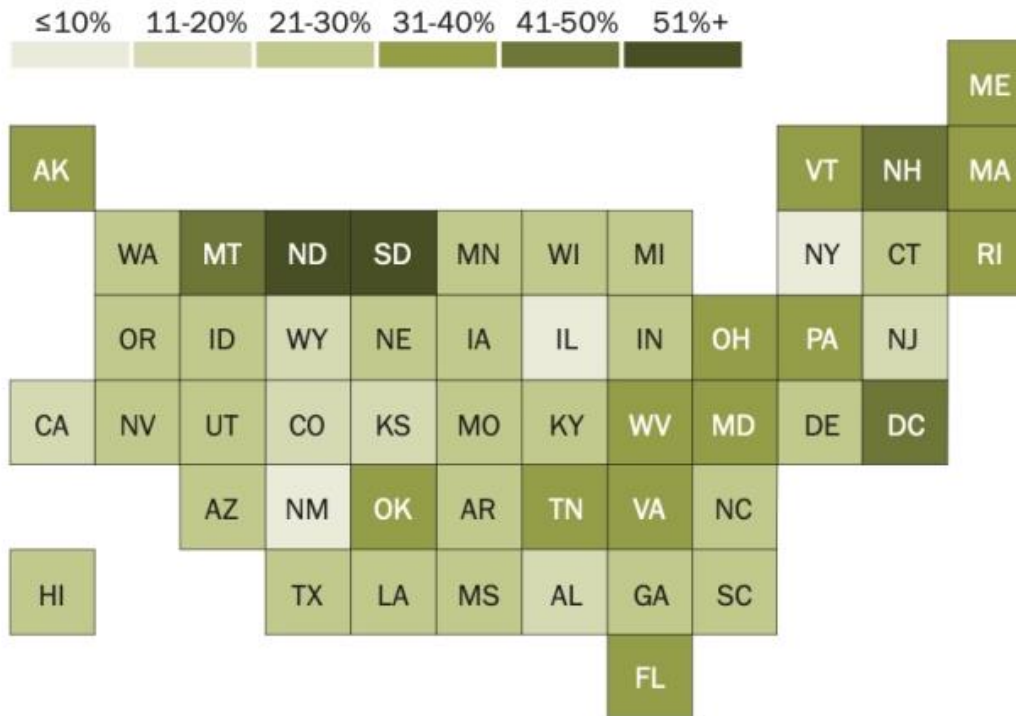
*U.S. population change by race and ethnicity, 2010-2019*

	<b>2019 population</b>	<b>Change, 2010-19</b>	<b>Share of total increase</b>
<b>Hispanic</b>	60,572,000	9,829,000	52%
<b>Asian</b>	18,906,000	4,145,000	22%
<b>Black</b>	41,147,000	3,134,000	17%
<b>White</b>	197,310,000	-79,000	<0%
<hr/>			
<b>Total</b>	328,240,000	18,918,000	

Note: White, Black and Asian individuals include those who report being only one race and are not Hispanic. Hispanics are of any race. Population figures rounded to nearest 1,000. Shares of total increase are calculated from unrounded numbers and may not add to 100%. Source: Pew Research Center analysis of U.S. Census Bureau Vintage 2019 estimates for 2010-2019.

# North Dakota and South Dakota have seen fastest increases in Hispanic population since 2010

% increase in Hispanic population, by state, 2010-2019



Note: Percent increase of each state rounded to the nearest whole number. Population estimates are as of July 1, 2019. Hispanics are of any race.  
 Source: Pew Research Center analysis of U.S. Census Bureau Vintage 2019 estimates for 2010-2019.

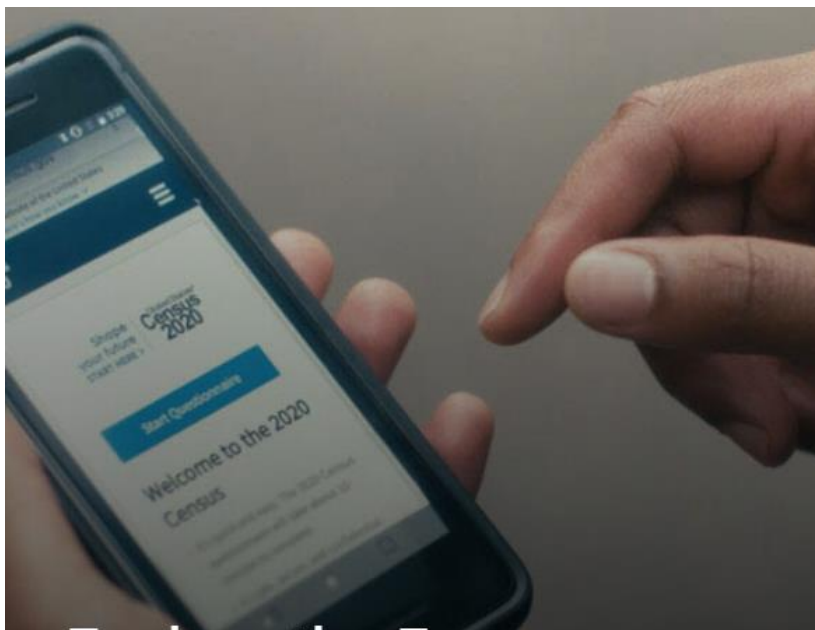


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# **THE 2020 U.S. CENSUS**

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## Census FAQs: Quick review



**Goal: Count everybody living in the U.S. once, only once and in the right place (including foreign citizens who are not tourists or business visitors)**

**People are counted as of April 1 – Census Day - where they live and sleep most of the time**

**Households can respond online, by mail or on the phone**

**Census includes a variety of operations to count those who are in institutions, transitory housing or without a home**

# COVID-19 delayed key 2020 Census operations

## Self-response phase

(Households send in their data)

Was: March 12-July 31

Now: March 12-Sept. 30

## Non-response follow-up (NRFU)

(Census workers knock on doors)

Was: May 13-July 31

Now: July 16-Sept. 30

## Group quarters

(Colleges, prisons, barracks, etc.)

Was: April 2-June 5

Now: April 2-Sept., 3

## Counting people without homes

(Service providers & outdoors)

Was: March 30-April 1

Now: Sept. 22-Sept. 24

## Counting at transitory locations

(RV parks, campgrounds, etc.)

Was: April 9-May 4

Now: Sept. 3-Sept. 28

# Concern about impact on historically undercounted groups

Fewer rallies and other get-out-the-count events in communities of color and immigrant areas

Fewer public and partner computers available for those without them, widening digital divide

Call center waits (problematic for those who don't speak English)

Other issues: College students and other pandemic movers hard to reach; false rumors that stimulus money linked to census



## On the other hand...

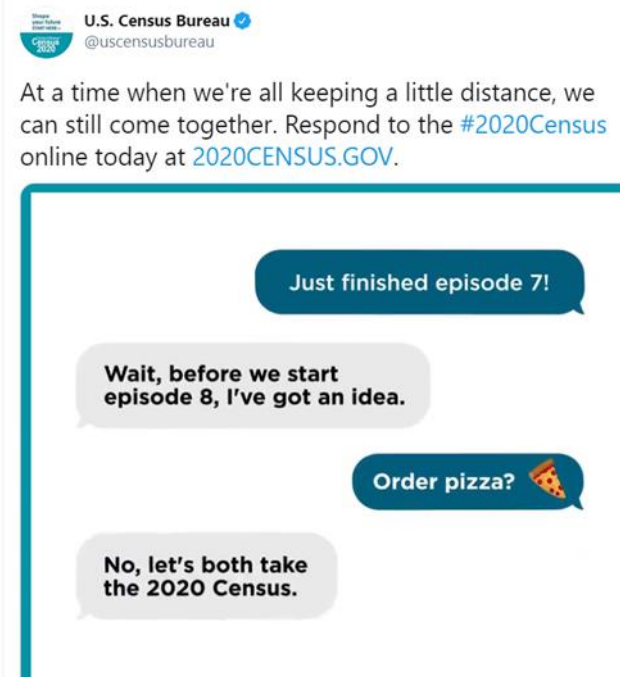
Online response higher than projected  
and website worked well so far

In a down economy, will quality of job  
applicants rise?

Innovative ways to get the word out –  
census material distributed at food  
bank events

Census Bureau confident of a good  
count of on-campus students

Advertising and marketing pivot



# Participation in the census varies by group

Among those who have not filled out their forms, six-in-ten say they would talk with a census worker who knocked and four-in-ten say they would not

Surveys find that historically undercounted groups are less willing to answer the census

Trust in government plays a role, as does education and income

In general, people who know more about the census are more willing to participate (as are those who see a benefit to their community)

## Most adults say they have participated in the 2020 census

*% saying whether they or someone in their household filled out and submitted a census form*

	Yes	No	Not sure
All adults	76	14	10
Men	74	14	12
Women	77	14	8
Ages 18-29	56	20	24
30-49	76	14	9
50-64	80	14	6
65+	89	9	2
White	79	13	8
Hispanic	74	14	12
Black	66	19	14

Notes: Share of respondents who didn't offer an answer not shown. White and Black adults include those who report only one race and are not Hispanic. Hispanics are of any race. Source: Survey of U.S. adults conducted June 16-22, 2020.

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# Gaps in knowledge about the census

Most people know that the census will ask about age and race

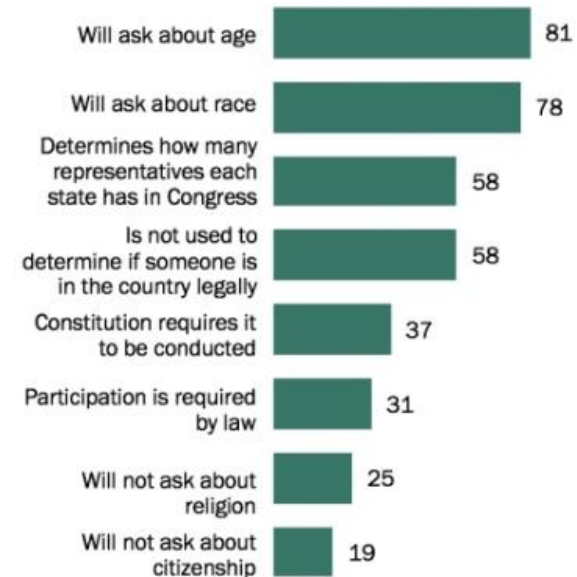
Most are aware it's used to divide up seats in Congress and is not used to find unauthorized immigrants

Fewer know that the census is mandated by the U.S. Constitution, and participation is required

As the census got underway, few knew that it does not ask citizenship status or religion

## Most are unaware that the 2020 census will not ask about U.S. citizenship

*% correctly saying that the census ...*



Source: Survey of U.S. adults conducted Feb. 25-March 9, 2020. "Growing Share of Adults Have Heard Something About the 2020 Census Recently"

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# Census numbers also may be delayed – stay tuned

Dec. 31, 2020 legal deadline to release **apportionment count** – how many seats each state gets in Congress. Census Bureau asked for extension to April 30, 2021, but now says it may not need that

April 1, 2021 deadline to release detailed local counts by race, Hispanic status, voting age 18+, occupancy status, some group quarters numbers – the **redistricting file** (sometimes called 94-171). Census Bureau had asked for extension to July 31, 2021 if Congress extends April 1, 2021 deadline

Release dates to be announced:

- Demographic Profile: Age, sex, race, Hispanic origin, household type, relationship, GQ population, occupancy, tenure (rent/own)
- Citizenship status from government records





# How are census numbers used?

**Federal funding - \$1.5 trillion a year is distributed based on formulas derived from the decennial census**

**Research purposes: Surveys and marketing decisions depend on an accurate population count**

**Location decisions and emergency planning: Schools, roads, businesses**

**State redistricting (legislature and local voting precincts) & funding (data delays will affect most states)**

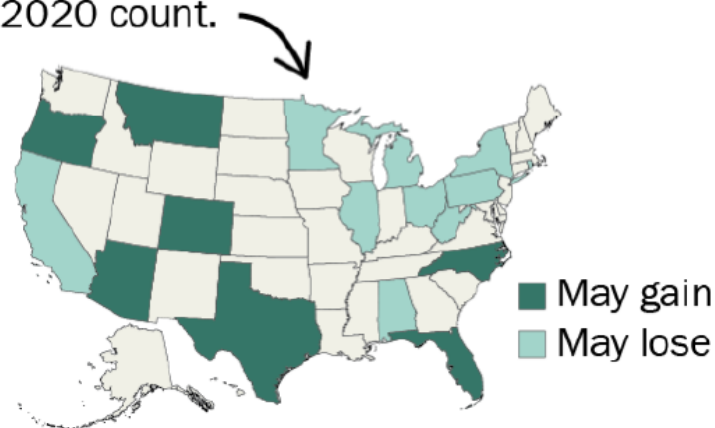
**Constitutional purpose to apportion seats in U.S. House of Representatives**

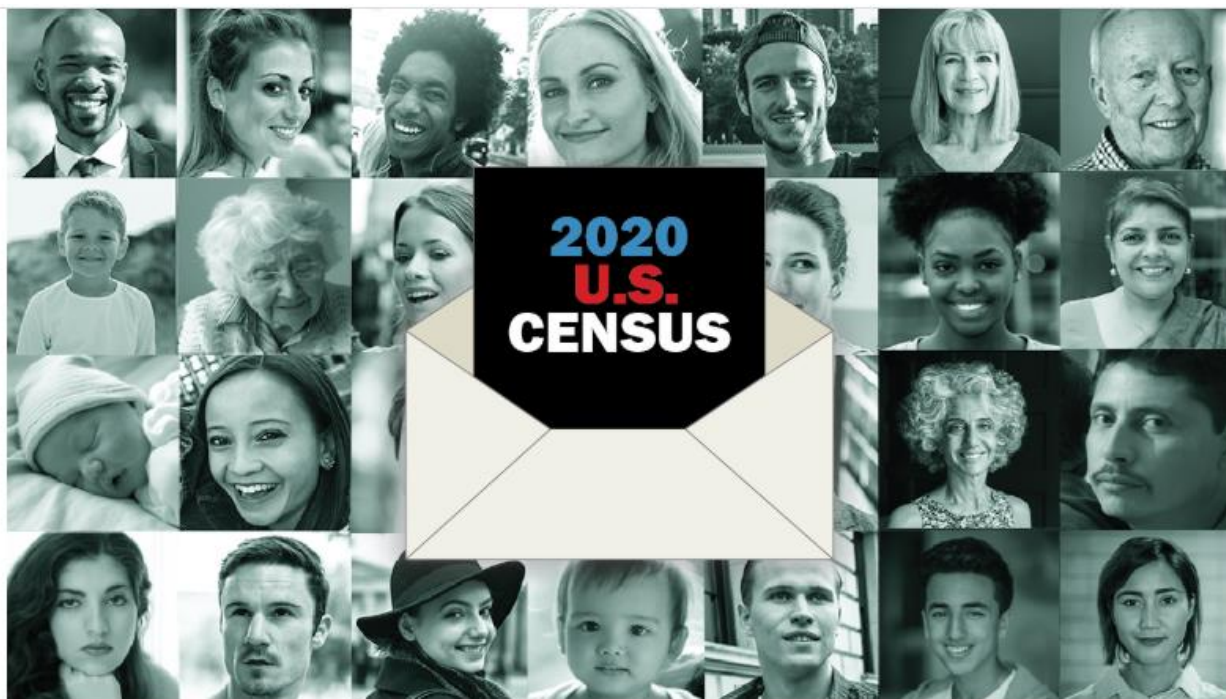


# What will we learn from the 2020 census numbers?

- Slowest U.S. population growth since the 1930s?
- Racial/ethnic growth and dispersion/ancestry
- Average household size may grow (economic implications)
- Population aging/fewer children in some places
- New data on family change – “same-sex married couple” now an option
- Homeownership rates
- Differing state population trends result in gains or losses of congressional seats

Some states are **projected to gain congressional seats**, while others are **projected to lose** them based on the 2020 count.





## Want to know more about the 2020 U.S. census?

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# Our next Marketing & Communications Watch webcast: Fake News: Protecting Truth in the Age of Misinformation

August 20, 2020 @11am ET

## Speakers



**Sinan Aral**  
David Austin Professor of Management  
MIT



**Chiqui Cartagena**  
CMO, Leader of the Marketing & Communications Center  
*The Conference Board*

## Moderator



**JP Kuehlwein**  
Marketing Institute Leader  
*The Conference Board*  
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### Speakers



**Gad Levanon, PhD**  
Vice President, Labor  
Markets  
**The Conference  
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### Moderator



**Elizabeth Crofoot  
(Moderator)**  
Senior Economist,  
Labor Markets  
**The Conference Board**



**Denise Dahlhoff,  
PhD**  
Senior Researcher,  
Consumer Research  
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