



COVID-19 Member Survey

Wave 1: March 18-19, 2020

Understanding the ripple effect this pandemic is having on the insights and data analytics industry and its partnerships.

LANDSCAPE

There's no doubt that at this point in time, every business and individual has been affected in some way by the Coronavirus pandemic. From cancelling social events to working from home to experiencing layoffs, the world as we know it has changed. [Insights Association](#) members have shifted internal operations as necessary during this time – 83% are implementing or increasing work-from-home policies, more than half have banned travel, and many are deep cleaning or taking other measures to keep employees safe and healthy.

From an insights industry perspective, the very nature of our jobs is keeping a pulse on how consumers are thinking and feeling – and with the rapidly changing situation, this has become increasingly important. However, as our personal health is threatened and all sectors of the economy slow down, we too feel the impact of this uncertainty. Research budgets tighten as business leaders react to economic downturn, and some question the value of consumer response during a crisis.

To better understand how COVID-19 is impacting the industry as a whole, a survey was fielded in partnership with Quester, Infotools, and Gongos to gain an understanding of both operational/project shifts and future outlook among members. We surveyed members from corporations, full-service agencies, and data collection agencies who work in qualitative, quantitative, software, and/or analytics.

Most members completed the survey on March 18-19, 2020. It's important to understand the socio-political context when this survey fielded, as policies and practices are rapidly changing. At the time of fielding, the number of confirmed cases was just over 8,500 across the nation and there were 145 deaths (Flexner, 2020). A national emergency had been declared, but most states had not yet implemented 'shelter in place' acts. Most Insights Association members were only beginning to feel the impact of COVID-19.

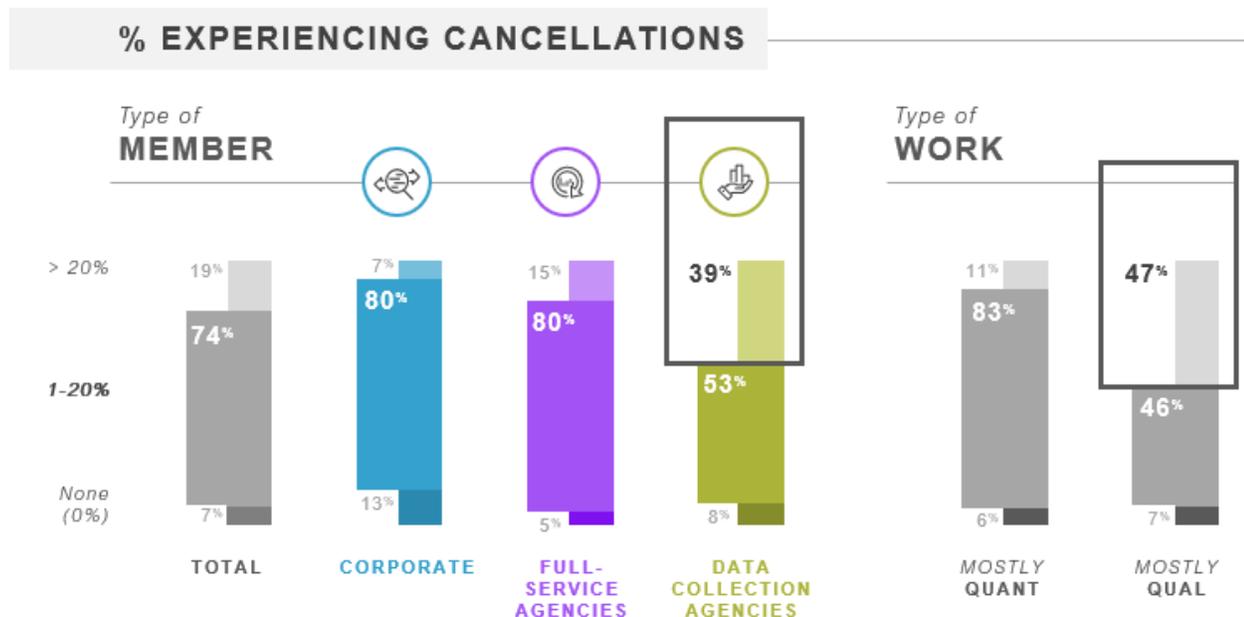
OUR FINDINGS

Perhaps unsurprisingly, we are seeing at least some shifting of work across the industry, and all members are concerned and uncertain about both short and long-term impacts – 78% reported being somewhat or very concerned. You could even say members are living in a bit of a gray area right now: 9% don't yet know how much work has been cancelled or postponed. However, we are starting to see some differences between corporate and agency members in terms of the level of concern and actions being taken.

AGENCIES: GETTING ANXIOUS, FEELING THE SLOW DOWN AND ADAPTING WHERE POSSIBLE

Agencies have been hit the hardest, especially data collection agencies. About 1/3 of data collection agencies report more than twenty percent of their work has been cancelled and 40% report more than twenty percent of their work being postponed. Full-service agencies are facing fewer cancellations than reported by data collection agencies.

Figure 1.



Looking closer at the type of work performed, qualitative-focused agencies have seen the most impact from cancellations. Social distancing was just starting to be enforced at the time of fielding this wave, directly affecting any planned in-person work. Forty-seven percent of agencies that do mostly qualitative work reported more than twenty percent of their work cancelled, and 54% reported more than twenty percent of their work being postponed.

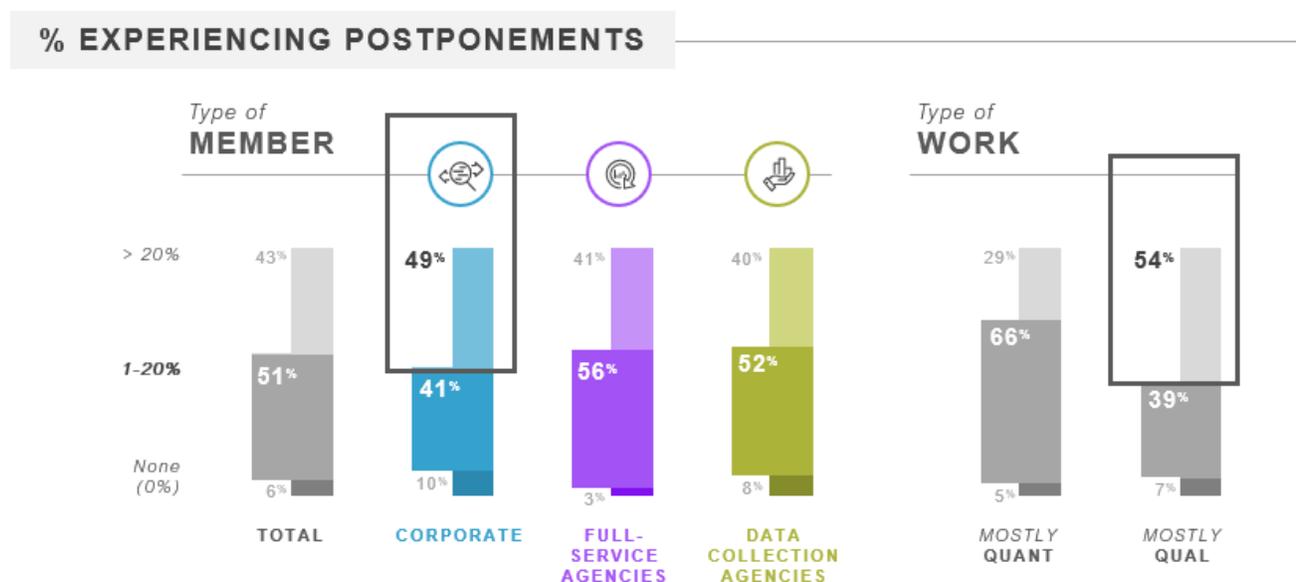
Despite challenges, agencies are trying to find creative ways to stay resilient as the situation continues to change. Thirty-one percent of qualitative-focused agencies have shifted at least eighty percent of their in-person work to online since online offerings are the healthiest part of the industry right now.

While qualitative-focused agencies are working to get comfortable with a digital world, we are seeing some quantitative, software, and analytics firms reporting healthy pipelines – 39% report steady to growing pipelines.

CORPORATE MEMBERS: SHIFTING TO ONLINE, RETHINKING TIMELINES AND FORGING AHEAD

Overall, corporate members seem to be weathering the storm, but the extent of this likely varies by industry. Only 7% are reporting more than twenty percent of work being cancelled, and 2/3 report no decline or even growth in the number of planned studies for the year. The bigger impact on corporate members is postponement – nearly 1/2 report that more than twenty percent of work is being postponed. In this climate, many timelines are still in flux.

Figure 2.



Corporate members, too, are shifting in-person work to online. Sixty-seven percent report more than eighty percent of in-person work has been transitioned online.

INDUSTRY IMPLICATIONS: TRANSPARENCY AND COLLABORATIVE CONVERSATIONS

From a workflow perspective, agencies are feeling more pressure as projects shift or timelines aren't clear. As corporate and agency members react to a changing landscape, communication may be missed, which could give greater line of sight to decision-making around research strategies and calm some fears.

On one end of the spectrum, data collection agencies are experiencing the most cancellations, while corporate members are still optimistic that work will happen eventually. Connecting often on reprioritization and long-term goals will ensure that agencies will be best equipped to partner in the coming months. Agencies will be looked to for proactive thought leadership around research best practices during this time. Corporates may see requests for changes in financial policies from providers and agencies most affected by the pandemic, and those corporate departments that are in a position to do so may consider options to assist their partners during this time. Let's lean on each other for creative solutions and agile strategies.

On a bright note, consumers are eager to be heard during this tenuous time – insights professionals should feel comfortable with work proceeding. Data collection should continue as a means to help us better understand the impact of this time on consumers' values. It's important to keep listening to consumers, and, as an industry, to listen to each other.

NEXT STEPS

The Insights Association will continue to keep a pulse on the industry and share findings with members. We will be fielding a second wave of research with both members and non-members, and will share those results as soon as possible. In addition, we've listed some resources below to help guide you and your organization during this time. We expect things to continue to change day-by-day and we are committed to serving our members as best as possible.

ADDITIONAL RESOURCES

Continuing research during COVID-19:

<https://www.insightsassociation.org/article/continuous-learning-essential-%E2%80%93-why-market-research-must-press-during-covid-19-pandemic>

<https://www.dynata.com/research-continuity-in-the-time-of-covid-19/>

<https://www.cint.com/blog/coronavirus-pandemic>

https://ds.gongos.com/corona_microsite

<https://www.insightsassociation.org/coronavirus-information-resources>

References

Flexner, Allison (2020). "There are at least 8,525 coronavirus cases in the US"

<https://www.cnn.com/world/live-news/coronavirus-outbreak-03-18-20-intl-hnk/index.html>