



COVID-19 Member Survey

Wave 2: April 6-7, 2020

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

LANDSCAPE

As the COVID-19 pandemic continues, social distancing mandates have become more widespread and restrictive. Changes triggered by the virus in mid-March have gradually moved from temporary to permanent in many areas. Now, schools across much of the country are closed indefinitely, most states have extended “stay-at-home” orders, and millions of unemployment claims have overwhelmed state resources. The pandemic has transformed life as we know it.

Companies and departments across the insights industry have been challenged to continue their important work – providing valuable updates on consumer sentiment and behavior, while at the same time ensuring the safety and well-being of their employees. The effects of the pandemic began to be felt a few weeks ago, as noted in Wave 1 of this survey. To track how industry operations, project timelines and future outlook would evolve in this fast-moving, unprecedented situation, the Insights Association fielded a second wave of this tracker in partnership with Quester, Infotools, and Gongos. As we did in Wave 1, we surveyed Insights Association members from corporations, full-service agencies, and data collection agencies who work in qualitative, quantitative, software, and/or analytics.

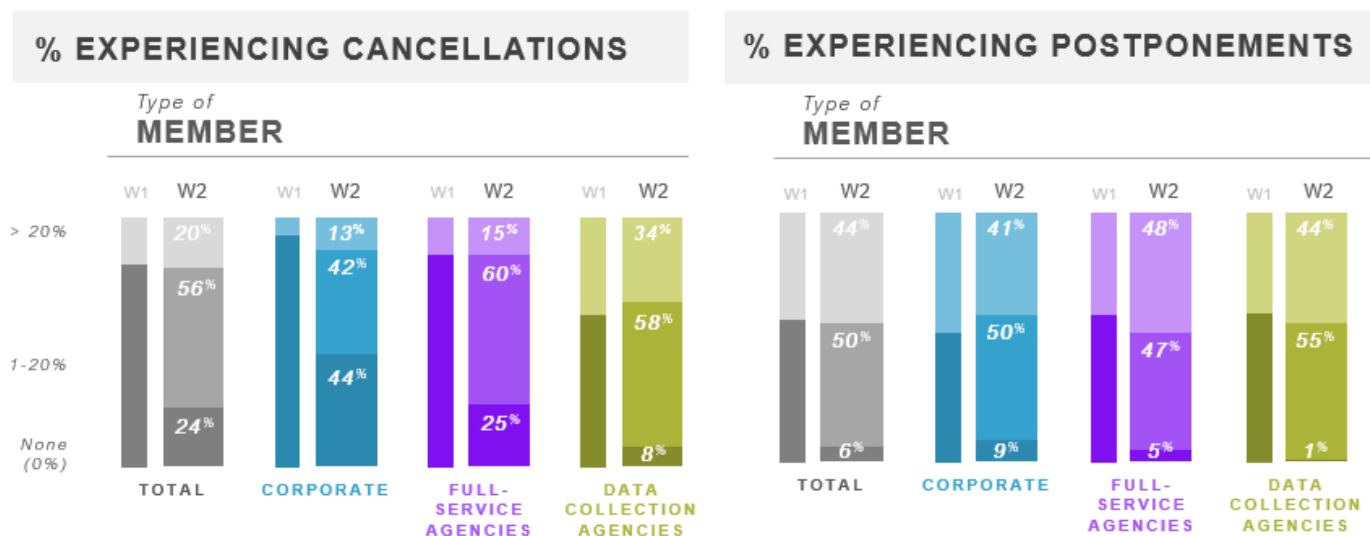
Most members completed the first wave of the survey March 18-19, and the second wave was fielded April 6-7. When Wave 1 was in field, a national emergency had been declared, but most states had not yet implemented “shelter in place” acts. By early April, 42 states and the District of Columbia were enforcing “shelter in place” orders, and a \$2 trillion stimulus package was signed into law to help offset the economic impact of the pandemic (Lee, 2020) (CNN, 2020). Businesses that may have tread cautiously at first are now required to rethink operations and staffing to keep people safe and manage cash flow.

These large shifts in our socio-political climate likely influenced many of the emotions and actions documented in our Wave 2 results, so it’s important to internalize them together to understand the full picture.

OUR FINDINGS

Concern levels remain consistently high among all members (77% somewhat/very concerned), and the outlook is much dimmer than it was a few weeks ago. The reality is setting in that business as usual cannot be maintained. We are now seeing a greater manifestation of these concern levels in the actions companies are taking, including canceling projects all together, pausing more timelines, temporarily closing facilities, and laying off certain sectors of the workforce. These are all happening in order to best manage the immediate and long-term impact of the virus.

Figure 1.



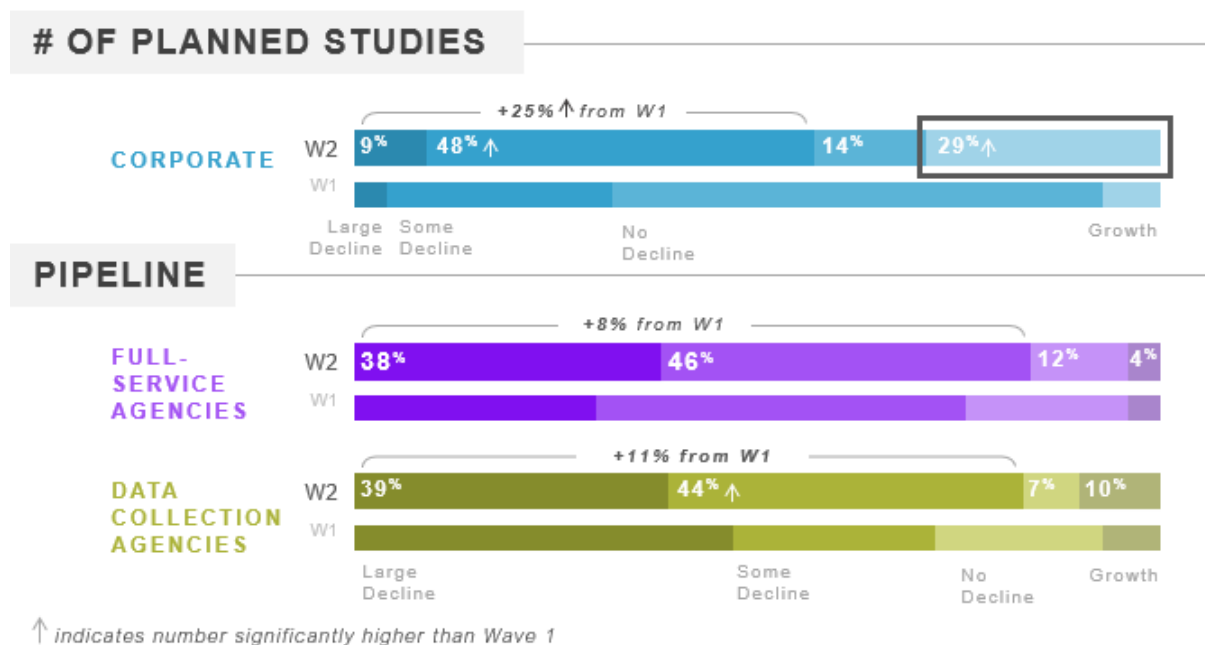
Note: 0% was derived in Wave 1, in Wave 2 it was asked directly; therefore, focus on 0-20% data together, which shows no change from Wave 1

AGENCIES: STRUGGLING TO ADAPT AS PIPELINES DRY UP

Across both waves, agencies have been hit the hardest, especially those in data collection. About one-third of data collection agencies report more than twenty percent of their work being cancelled and 44% report more than twenty percent of their work has been postponed (see Figure 1). Full-service agencies are facing fewer cancellations than reported by data collection agencies – 15% report more than twenty percent of their work being cancelled, which was consistent with Wave 1. However, full-service agencies are feeling the postponement squeeze – 48% report more than twenty percent of work has been postponed, up from 41% in Wave 1.

By Wave 2, the vast majority of both data collection and full-service agencies have seen even more decline in their sales pipeline: 84% of full-service agencies and 83% of data collectors report pipeline declines (up from 76% and 72% respectively from Wave 1; see Figure 2).

Figure 2.



CORPORATE MEMBERS: NAVIGATING CANCELLATIONS AND CHANGING PLANS, THOUGH A FEW SEE NEW HOPE FOR GROWTH

Corporate members are now feeling the impact more than they were a few weeks ago.

Directionally, they report more cancellations –13% in Wave 2 (vs. 7% in Wave 1) said more than twenty percent of their work has been cancelled. Postponements have also declined slightly but not significantly, suggesting some projects that may have been delayed are now cancelled as corporate budgets are being reevaluated (see Figure 1).

More concerning is the significant change in planned studies from Wave 1 to Wave 2. Corporate members are divided; the majority are deciding to forego planned studies, while a few are building momentum for future workstreams or positioned in growth industries. Fifty-seven percent report some or large declines in the number of planned studies, compared to 32% in Wave 1. Simultaneously, 29% in Wave 2 (compared to 7% in Wave 1) have seen growth in the number of planned studies (see Figure 2).

While the sample size is extremely small, we can directionally see that compared to the total universe of corporate respondents, those seeing growth are more likely to be smaller in size and located in the Midwest. They still have some optimism for the future and have experienced little to no cancellations at this point.

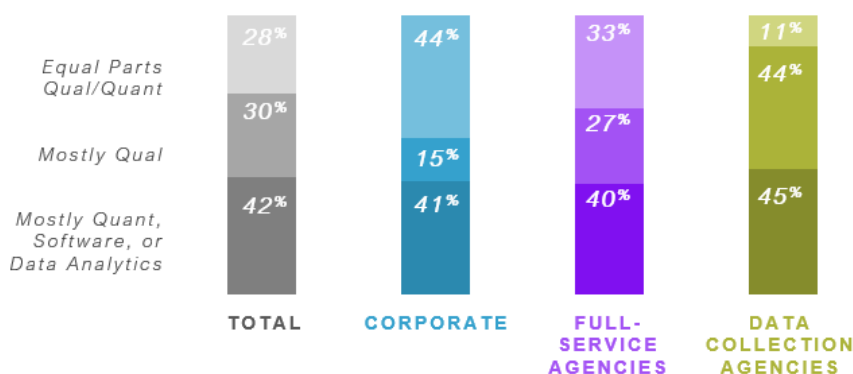
WORK SHIFTS: ALL WORK IS BEING RE-EXAMINED AND ADAPTED WHERE POSSIBLE

As members reprioritize objectives, reallocate budgets, and reassess timing for certain studies, all projects are on the table and eligible for adjustments – not just qualitative. In fact, quantitative projects are being cancelled or postponed as much as qualitative (see Figure 3).

Figure 3.

TYPE OF WORK POSTPONED/CANCELLED

Note: New question for Wave 2 - no tracking included



Members remain flexible and dedicated to finding creative solutions to still gather insights where possible. More than one-third of respondents have shifted at least 80% of their in-person work online, and 95% of agencies are being flexible with cancellation policies (consistent with Wave 1).

INDUSTRY IMPLICATIONS: SUPPORT IS CRITICAL AS TOUGH DECISIONS PAVE WAY FOR AN UNCERTAIN FUTURE

As the pandemic intensifies, many are resorting to staffing and operational changes to compensate for cancellations, postponements and other shifts in work. Sixty-seven percent are allowing flexible work conditions (hours, WFH, etc.), 49% have temporarily closed facilities, and 2% have had to close facilities permanently. Layoffs, too, have become a reality: 33% percent of data collection agencies, 22% of full-service agencies, and 13% of corporate members have laid off employees.

Businesses are realizing that they can no longer put off the inevitable. Decisions are now being made that will impact workstreams and, more importantly, employees in the short and long-term.

To help navigate the next few months, empathy, flexibility, agile strategies, and future-focused thought leadership remains critical:

- Being empathetic to our clients, research participants, employees, and colleagues builds loyalty and strong partnerships.
- Employing flexible policies where possible on current contracts and giving access to new employment opportunities will help sustain our industry and allow us to weather the storm together.
- Designing agile research solutions will help us adapt best to moving target objectives and tightening budgets.
- Communicating insights that offer a balanced view of current and future consumer shifts will help clients develop more targeted recovery strategies.

NEXT STEPS

The Insights Association will continue to keep a pulse on the industry and share findings with members where applicable. If you have lost a job or have had to lay off any staff members, our [Career Center](#) is a helpful resource in addition to those included below. We expect things to continue to change day-by-day and we are committed to serving our members as best as possible.

ADDITIONAL RESOURCES

An extensive list of information for businesses and professionals, as well as consumer-related research during this health emergency, may be found on [the Insights Association's COVID-19 Resource Page](#). If you are conducting research during COVID-19, and wish to have your findings included on this page, [please contact us](#).

References:

“By early April, forty-two states and the District of Columbia had stay at home orders in place” (Lee, 2020) <https://www.cnn.com/2020/03/23/us/coronavirus-which-states-stay-at-home-order-trnd/index.html>

Coronavirus Timeline

(CNN, 2020) <https://www.cnn.com/2020/02/06/health/wuhan-coronavirus-timeline-fast-facts/index.html>