



March 2020

The Impact of COVID-19 on Research

THE IMPACT OF COVID-19 ON RESEARCH

Summary of Findings

The insights industry must transition to adopt virtual research approaches and technologies. The long term impact of COVID-19 on the insights industry is largely still unknown. Short term, in the qualitative field especially, projects are either canceled or at the very least delayed. Just under 30% of Market Research Professionals interviewed report that their qualitative work is likely to be delayed “beyond 2 weeks.” They are adopting alternative methods and moving research that traditionally took place in person, **mainly focus groups, to a virtual setting.**

There is stated belief that research budgets will decrease. Thus there is expressed interest in ways to **effectively pivot research** practices and adopt new technologies to meet objectives. Online solutions that enable a quicker shift so as not to delay projects further but also engage respondents effectively to ensure quality data are key in the **continued rollout of research.** The ability to **interact in real time with their respondents** is top of mind. Due to rapidly changing conditions, they are also turning to methodologies that enable **faster data collection and reporting.**

When considering the quality of data from traditional approaches (focus groups) against those of virtual research (online focus groups/conversations), approximately two-thirds report having similar levels of concern, indicating that they have **confidence in the ability of new methodologies** to provide valid output.

Further bolstering that they believe the data returned will be valid, they call out elements of virtual approaches that promote sound research practices, namely **confidentiality and anonymity, and sample size and quality.** The ability to talk to more and diverse participants, and the potential to scale and expand your audience means more reliable data.

There is an expectation that COVID-19 will change the focus of respondents. There is disagreement - they are divided on whether or not participation rates will be positively or negatively impacted. They are, however, largely aligned that the pandemic will influence both participant behavior and consumer “needs and wants.” There will likely be a shift in their purchasing habits - less discretionary spending in favor of getting “**back to the basics.**”

Over 80% believe that respondents will have different or new biases. The near term shift of consumer focus will likely introduce different respondent bias; in response market researchers will likely adjust questionnaires, level set and **probe on respondent answers** in order to understand biases.

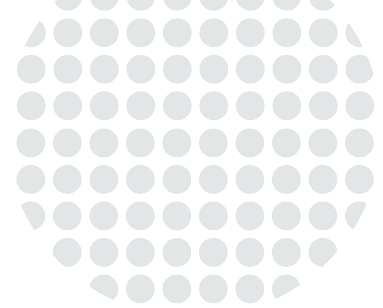
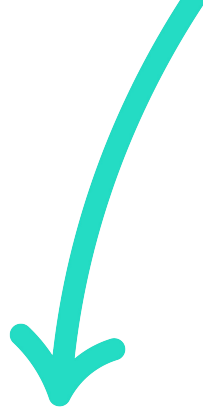
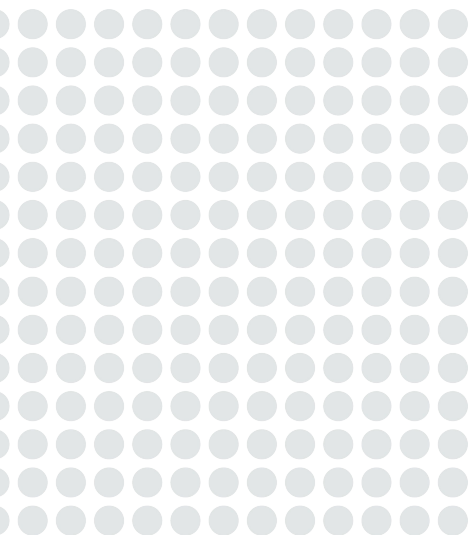
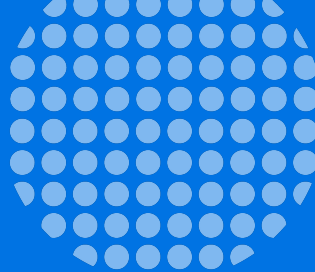


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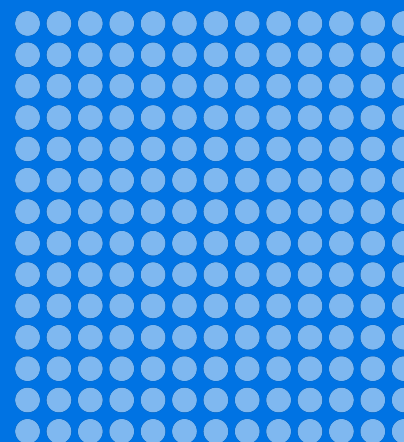
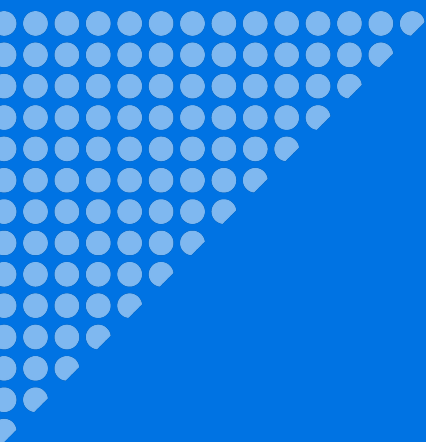
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Shifting the Insights Industry Online



The long term impact on the insights industry is largely still unknown; however, in the immediate term market research professionals have already started to feel the effects of COVID-19 on the industry at large, as well as on their own projects

A vast majority, 81%, of the market research professionals (MRX) interviewed work with qualitative research, either exclusively (27%) or as part of a “hybrid of both” (54%). Conversely, only about 1-in-5 (19%) of those interviewed indicates their work involves only “quant.” In the qualitative field especially, there are some obvious and not surprising consequences of quarantines and social distancing. These include (1) a **delay or outright cancellation of research projects, especially in-person qualitative research**; and (2) employing alternative methods and moving research that traditionally took place in person to a virtual setting. **There is great uncertainty and some fear that current events will have a lasting impact and recruitment for qualitative research will be a challenge going forward.** However, interestingly, there is also wide recognition that data driven insights are now more important than ever to guide their (clients’) overall business strategy. **Thus, they are interested in ways to effectively pivot research practices and adopt new technologies to meet objectives.**

“All in person research has come to a complete halt for an indefinite amount of time”	64%	Resonates more with MRX at agencies and consultants, (70%) than MRX on Inhouse insights teams (56%)
“Made it more relevant as a source of fact-based info for use in business decisions”	61%	
“PD events are canceled, I am no longer speaking at a conference. I am working from home, some of my projects are delayed and others are prioritized as more important. I don't think I will be able to recruit for focus groups later on in the future.”	61%	
“In person qual is moving online or phone, and companies are potentially going to spend less ”	59%	
“No more face to face sessions so everyone is thinking of new ways of engaging research participants”	55%	

Q: How has Coronavirus impacted (if at all) our industry as a whole in the last few weeks?/How has Coronavirus impacted (if at all) your specific research projects in the last few weeks?/Is the majority of your research...Do you anticipate personally handling your work or research remotely in the upcoming weeks?/Do you anticipate having to do any of the following with respect to QUALITATIVE research?/ If you had to choose only one, what is the single most difficult part of conducting research in the current climate?

Almost all, 95%, anticipate having to complete research remotely in the upcoming weeks

Almost one-half (49%) indicates that their qualitative work is likely to be delayed for “two weeks” (21%) or even “beyond 2 weeks” (28%). MRX at agencies and consultancies are more likely to delay their research beyond 2 weeks compared to Inhouse Insights team (32% v. 26%, respectively). Though they acknowledge the need to transition, there is also uncertainty around how to roll out new strategy, and an underlying fear about the bottom line in general, as they foresee a decrease in research spend: “budgets may be put on hold because of the volatile market, projects in limbo moving forward.” **A reliable, cost effective online solution that enables a quicker shift so as not to delay projects further is key in the continued rollout of research.**

“Certain projects where we need to work in person with the client (personal interviews, larger workshops) cannot be conducted anymore.”	72%
“Quickly shift everything to online and adjust timelines - but hard to predict when in person research can become a reality again ”	71%
“In person research canceled and trying to figure out what digital can replace, slow down in sales and delayed launches of new products”	70%
Trad focus groups cancelled or postponed	62%

Q: How has Coronavirus impacted (if at all) our industry as a whole in the last few weeks?/How has Coronavirus impacted (if at all) your specific research projects in the last few weeks?/Is the majority of your research...Do you anticipate personally handling your work or research remotely in the upcoming weeks?/Do you anticipate having to do any of the following with respect to QUALITATIVE research?/ If you had to choose only one, what is the single most difficult part of conducting research in the current climate?

MRX report the Insights Industry is agile; new solutions enable the transition to virtual research

The vast majority (85%) of MRX characterize the insights industry as “agile.” MRX on Inhouse Insights teams are more likely to say the industry is “somewhat agile” than those at agencies or consultancies (73% v. 58%, respectively). The latter are more inclined to characterize it as “not very agile” than their Inhouse peers (18% v. 9%, respectively). This could indicate a lack of awareness of specific agile solutions. MRX on Inhouse insights teams especially report that they are: **“Already using some agile tools but opportunity to increase usage and try new tools.”** MRX largely believe that the industry relies heavily on mixed methodologies which enables them to pivot to address changing situations. There is interest in and a clear openness and willingness to be fluid. Moreover, they surmise that **new technologies will support agile research.** There is doubt that MRX who are not agile will be able to adjust to the new environment.

“Most agencies use a mix of methods and approaches so not hard to shift focus.”	77%
“There are many many many more tools now than just a few years ago.”	76%
“Flexible means of research, such as Remesh, allow us to quickly pivot. ”	74%
“I think everyone was moving towards agile in some capacity , but many were still testing the waters.”	71%
“Traditional research firms - not sure how they will adjust if they're not conducting research digitally/virtually”	69%

Resonates greatly with MRX on Inhouse insights teams

Q: In its current state, and given how quickly things have had to shift because of COVID-19, how agile, if at all, do you believe the INSIGHTS INDUSTRY truly is? / Please tell us more - why did you personally select the answer that you did?

MRX have implemented a variety and combination of approaches to transition to virtual research

The industry still relies on focus groups, a staple of consumer research. Some, likely due to lack of awareness and familiarity, have not used new virtual techniques. Those who have employed online methodologies have been largely using online focus groups, either through dedicated platforms or through stitching together various applications. The key element they are looking for is the **ability to interact in real time** with their respondents. Also noteworthy, MRX call out speed. Due to rapidly changing conditions, they are turning to **methodologies that enable faster data collection and reporting**.

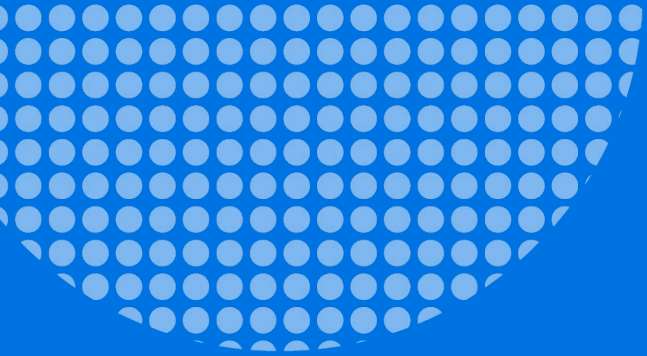
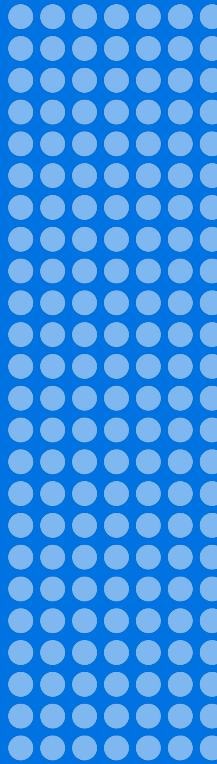
Virtual Techniques Employed:

"Online focus groups"	71%
"This platform plus video conferencing"	64%
"Virtual collaboration."	63%
"Zoom + online qual panels/platforms"	62%
"Not new, but more Qualboards, using more interactive types of survey questions , subbing phone interviews for IDI's, starting video interviews"	59%
"We've been doing a lot more super-fast turn quant, as sentiment is changing daily . (Overnight polls/ reports.)"	45%

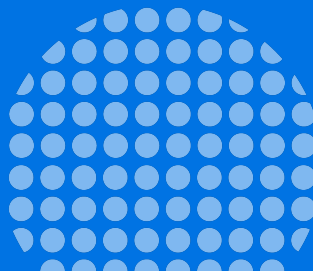
MRX who have not adopted virtual techniques nonetheless express interest and are **currently examining options...**

Virtual Techniques Not Yet Employed:

"so far none, but exploring new ways of online research"	54%
"still assessing which techniques to use"	53%
"none yet. still exploring best options. "	51%
"we are investigating new online qualitative vendors and software"	62%



Challenges & Benefits of Online Qualitative Research



The shift to online qualitative research appears inevitable as MRX are already either moving in this direction or had already migrated

Almost all, 97%, say they are likely to consider conducting qualitative research virtually. In the immediate term, and likely in the longer term, they will **adopt new virtual techniques that enable them to take the traditional focus groups online**. However, MRX report certain challenges that may also be fueling their uncertainty about the future state of the industry. When asked unaided, budgets are understandably top of mind, as are the logistics of simply being virtual. But also at issue is the nature of online research. MRX call out the quality of online overall, with specific concerns about the ability of digital platforms to deliver what they have come to expect from traditional research in recruitment, fielding and data. Of note, **they also worry about bias**: “Skewed results due to the nature of a pandemic. Our entire world has been flipped upside down. It is inevitable that this will have an impact in our research.”

“The uncertainty of responses, recruiting and virtual methods providing the same level of quality as in person”	64%
“Uncertainty of timing and ability to recruit participants”	64%
“I expect recruiting to be harder and realistically results are not going to be objective.”	63%
“Data collection”	62%
“Finding the right platform that can provide the same experience as in person research would”	59%

MRX on Inhouse insights teams appear less concerned about recruitment than MRX at agencies and consultants

Q:If you had to choose only one, what is the single most difficult part of conducting research in the current climate?/Given the constrained circumstances in which we must now conduct qualitative research, how likely, if at all, are you to consider conducting research virtually/online?/ Please share with the group - tell us why you would or would not conduct research virtually/online

The advantages of virtual research are clear; evolving online is necessary in this climate to “keep projects moving”

But when probed further, there is less skepticism about data quality. The benefits of moving online are, in one respect, obvious. Traditional facilities are closed, greatly limiting the opportunity to bring people together. It goes to follow that bringing respondents together in a virtual room is the only safe way to execute research during a health crisis. Other benefits are not as apparent but are eventually surfaced. In response to quality concerns, some MRX call out elements of virtual approaches that promote sound research practices, namely **confidentiality and anonymity, and sample size and quality of responses**. The ability to talk to more and diverse participants, and the potential to scale and expand your audience, while providing a safe forum through which they can honestly express their opinion, means more reliable data. Over two-thirds express that going virtual does not increase their concerns about data validity. Of note, MRX believe that their colleagues who are not adopting online simply **need to become more familiar with virtual research**.

“I would conduct online - the safest venue now and consumers share more details in an anonymous context. ”	70%
“I would - completely necessary at this time. Brands who don't is probably just because it is uncharted territory for them.”	67%
“It's part of our core offering, online does give us the opportunity to think about breadth of participants. ”	67%
“I would because I think you can actually get more participants that way”	66%

Resonates greatly with Inhouse insights teams

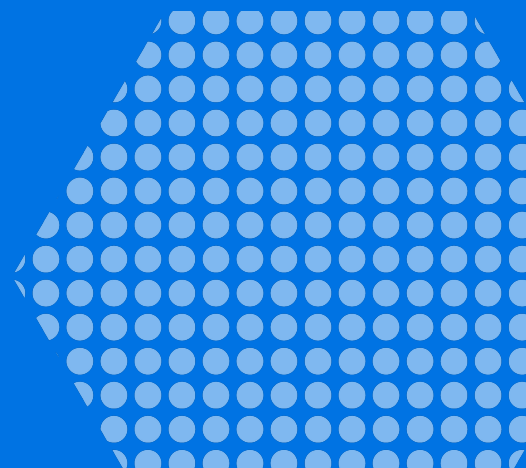
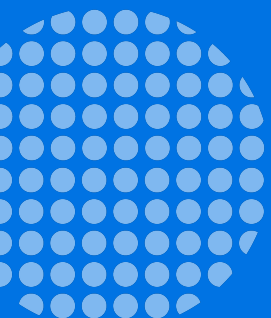
To what extent, if at all, are you concerned about the validity of your data or output as compared to validity of data through traditional methods?	
More concerned than usual	32%
Same level of concern	65%
Less concerned than usual	3%

Driven by MRX on Inhouse insights teams: 63% express same level v. MRX at agencies and consultants, 55% of whom say same

Q:If you had to choose only one, what is the single most difficult part of conducting research in the current climate?/Given the constrained circumstances in which we must now conduct qualitative research, how likely, if at all, are you to consider conducting research virtually/online?/ Please share with the group - tell us why you would or would not conduct research virtually/online



Shifts in Participant & Consumer Behaviors



MRX expect that the evolution of the pandemic will increase participation but also change participant behavior

MRX are considerably more likely to think this period will result in “participation increase” than “participation decrease,” 40% v. 21%, respectively. Moreover, only about one-quarter see a likelihood of “response rate decrease.” The single greatest impact perceived by MRX **focus on the participants themselves and falls under “behavior change”** (70%). MRX are split on what this change will look like. Some believe that people, seeking to earn money, would be more open to participating in projects. Others believe they will be too distracted to engage in research. MRX however, are **largely aligned that the pandemic will impact consumer “needs and wants.”**

Which of the following, if any, do you anticipate will happen given the current climate? Select all that apply.	
Behavior change (i.e. response to stimuli or questions)	70%
Participation increase	40%
Response rate decrease	29%
Participation decrease	21%
Increased access to participants (aka sample)	21%
Reduced access to participants (aka sample)	20%

Driven by MRX on Inhouse insights teams (83%) v. MRX at agencies and consultants (61%)

“Consumers’ needs and wants will change”	63%
“The way I see it more people will be laid off so they will have more time and more need for money ”	61%
“If they're most distracted, they're less likely to engage in research (unless it's topical e.g., about COVID-19)”	61%
“More sensitivity to issues”	60%
“Especially with B2B studies - the nature of work will change, the increasing unemployment rates will impact responses.”	59%

Resonates with MRX at agencies and consultants more than MRX on Insights teams

MRX believe consumers will focus on “needs” over “wants,” changing the nature of their purchasing habits

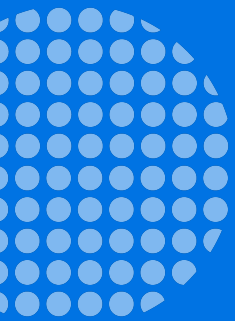
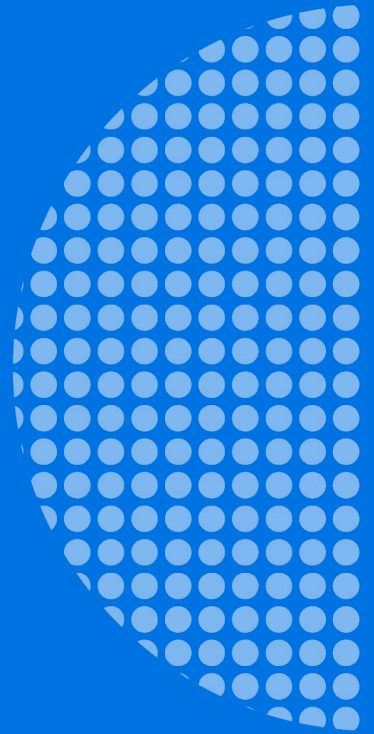
Though they admit that it is difficult to gauge, MRX, especially those on Inhouse Insights teams, expect that in the short term consumers will largely **return to the basics**: “It’s hard to say, but I think it will be hard to get people to focus on the ‘old’ concerns—it seems like a lot of the problems have been trying to solve don’t necessarily apply anymore.” There is belief that the pandemic will **shift consumers from discretionary spending** to essential purchases (food, groceries, health and safety related products) and that consumers, especially those facing layoffs, will be more thoughtful and practical about how they spend their money. MRX would not be surprised if the economic impact of the pandemic negatively impacts spending even after the resolution of COVID-19, saying that “People will still be cautious for a while,” though MRX at agencies and consultants think that “Eventually, most will revert to past behaviors.” MRX on Inhouse Insights team predict more lasting changing behavior.

“Focus is on primary needs, not wants , looking at sustainability for longer-term as well as immediate needs, many are reactive and in a panic versus calm common sense approaches”	74%
“More focused on security and safety ”	71%
“Priorities are shifting to more immediate and base needs ”	68%
“Less automatic behavior. People will have time to think out what is important to them and what they want.”	68%
“In the near term, it seems to be back to basics . Possibly less discretionary spending for a while.”	66%
“Their main focus would be on fundamental needs which would keep them safe in current outbreak ”	66%

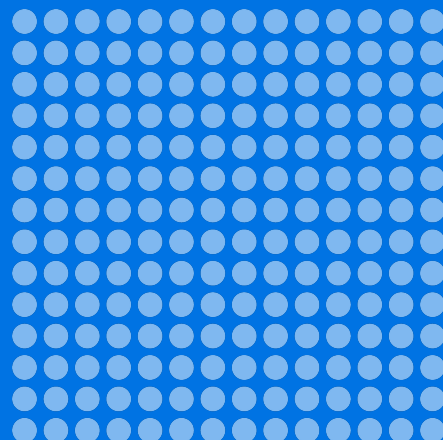
Resonates more with MRX on Inhouse Insights teams (83%) more than MRX at agencies and consultants (70%)

MRX, again especially those on Inhouse Insights, also believe that **brand perception** will be impacted by a company’s response to COVID-19: “There will be a lot of bias around brands that handle this situation well or bad. It will be hard to create a balanced view.” They advise empathy, transparency and communication, but also, to “**Continue doing research** - not just guess how customers’ mindsets are changing.” This highlights the importance of **ensuring research with stakeholders is not disrupted**.

Q:A lot of us think participant behaviors will change. Tell me more - how do you think they will change?/ How will consumers' needs and wants change? / How do you think consumer behavior will change, if at all, following the resolution of COVID-19?/ How do you think you will handle potential new biases? / How can brands mitigate risk in this environment?



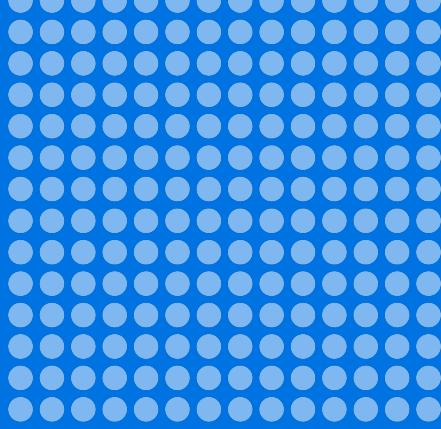
New Biases



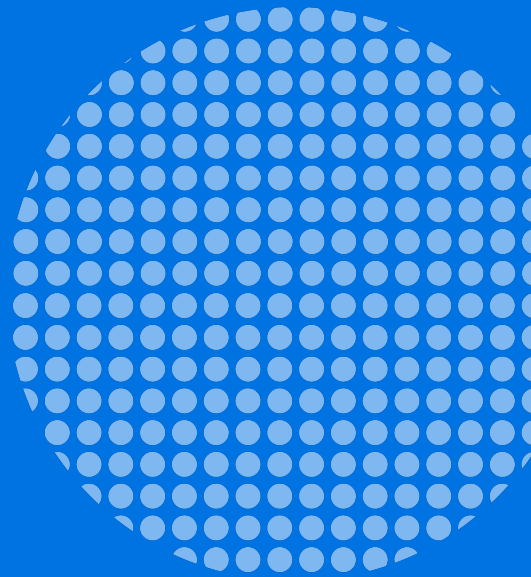
The near term shift of consumer focus will likely introduce different respondent bias; MRX will adjust questionnaires, level set and probe to understand biases

Over 80% of MRX believe that respondents will have different or new biases and expect that they will be “Accounting for differences/bias in answers due to COVID-19 occupying a significant amount of headspace.” Those at agencies or consultants especially perceive “new unconscious bias based on fear” and are “making COVID-19 a part of every project's conversation - how might it impact project X? Project Y?” In terms of handling new respondent biases, though, there does not appear to be a clear path. Responses are widely diverse, ranging from tackling bias at the outset by rethinking the design of instruments, to acknowledging/setting the stage and **probing biases during execution**, to adopting new frameworks when analyzing data. However, MRX are aligned that bias is not a new concern in the industry.

“Rethinking approach to questionnaire development and how perceptions and needs have shifted during this time”	60%	Resonates with MRX on Insights teams (62%) more than MRX at agencies and consultants (51%)
“Probing responses to understand biases”	58%	
“Just need to interpret responses keeping context in mind”	57%	
“Biases is not something new - current events and people’s lives are constantly impacted - coronavirus is just accelerating these bias development.”	57%	Resonates with MRX at agencies and consultants (60%) more than MRX on Insights teams (45%)
“we might phrase our questions differently or ensure a place to capture concerns up front , and get it out of the way.”	55%	
“Really think about how questions are asked and how the data can be interpreted in analysis”	55%	
“Apply a new lens for the foreseeable future to contextualize feedback and findings”	52%	



Appendix



Methodology

Participants engaged in a synchronous conversation and provided their own unique responses to open ended questions - and voted on others' responses live as well. Open ended responses are ranked by percent agree scores. This report includes top ranked responses; representative subset, or spread of opinion, may be included as applicable. Responses that are shown together are from the same question, and not combined across multiple questions.

How to be a participant

- 1** The Moderator asks the group a question.

You respond to the question in your own words.

What do you like about the package design?

1:37

The vivid colors & logo
- 2** Then, you vote on other participant responses in two different exercises.

Which response do you prefer?

Select which response you agree with more by clicking on it. Continue voting until the time runs out.

Which response do you prefer?

0:57

The text is too small and difficult to read but I love the retro colors!

I like the bold colors but want to be able to read the ingredients better

I can't decide

What do you think of this response?

Select whether you agree or disagree with the response shown. Continue voting until the time runs out.

“

0:34

The simplicity of the wording is nice

What do you think of this response?

I agree

I disagree

Session Date: March 19, 2020

Session Time: 12:00 PM ET

Session Length: 30 Minutes

Session Sample Size: N~100

PARTICIPANTS' MAKE-UP

N~100

Organization

Inhouse insights team	30%
Market Research Agency	35%
Ad Agency	6%
Management Consulting Firm	11%
Other	18%

Remote due to COVID-19

Yes	94%
No	6%

State of COVID-19 in your geographic area

Limited community transmission	35%
Ongoing Community Transmission	26%
Widespread ongoing transmission without restrictions of entry to your country or state	13%
Widespread ongoing transmission with restrictions on entry to your country or state	27%

Industry

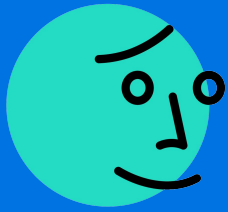
Consumer Packaged Goods	23%
Healthcare	10%
Consumer Tech	7%
Media	5%
(those 1% and under, not listed)	

Company Size

1 - 100	31%
101 - 500	25%
501 - 2,500	15%
2,501 - 10,000	8%
10,000+	21%

Location

US (Northeast)	26%
US (West Coast)	15%
US (Midwest)	19%
US (Southwest)	3%
US (South)	9%
Continental Europe	5%
UK / Ireland	9%
Asia	9%
Other	4%



Thank You!

If you have any questions, please feel
free to reach out to hello@remesh.ai