

Impact of COVID-19: ICG Members Survey 2020



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Survey aim: to determine the impact of COVID-19 is having on the practice and business of ICG members.

Methodology:

An online survey of all ICG members between 9th April and 4th May 2020. All questions were created by Health Outcomes Insights and Survey Mechanics. All data were produced by Survey Mechanics Platform.

Key findings:

- A total of 113 (46%) ICG members responded to the survey
- Top four business main activity (N=109, 96%)
 - Qualitative (63.3%)
 - Quantitative (33.9%)
 - Consultancy/planner (12.8%)
 - Data analysis/interpretation (10.1%)
- Crisis affecting your practice next 18 months (N=109, 96%)
 - Too early to say (45%)
 - Severely damaging (31.2%)
 - Slightly damaging (22.9%)
- Client behaviour (N=100, 88%)
 - Client deferring decisions (84%)
 - Cancelled research projects (41%)
 - Client cannot be contacted (30%)
- Businesses affected by crisis (N=103, 91%)
 - Decreased by more than 75% (27.4%)
 - Stopped entirely (24.8%)
 - Decreased by 51% to 75% (8.8%)
- Top 3 % of businesses most affected by crisis (Stopped entirely)
 - Qualitative research (88.89%)
 - Quantitative research (37.04%)
 - Report writing/reporting services (29.63%)
- Top 3 % of businesses most affected by crisis (Reduced by more than 75%)
 - Qualitative research (76.67%)
 - Quantitative research (50.00%)
 - Consultancy/planner (43.33%)
- What lessons can we (the research industry) learn from the crisis? (N=71, 62%)
 - Key finding: Moving to online research and being agile.

One thing is for sure right now – no one knows what the future will hold post the COVID-19 pandemic. Everything is changing so fast, market researchers are grappling with finding ways to keep up. But, making changes and employing new strategies can be wrought with challenges. It's therefore, crucial that we pool our collective wisdom of the group and source the insight of others now, to help build predictions of the future and plan effectively to prepare for whatever the post-pandemic world may bring. That is the purpose behind this survey carried out by ICG members, Keith Meadows, Health Outcomes Insights and Peter Martin, Survey Mechanics, to obtain members views and opinions of what the impact of COVID-19 has been on ICG members practice and business. This report presents the topline findings from the survey. For enquiries contact Dr Keith Meadows: keith@healthoutinsights.com

The questionnaire

The questionnaire comprised 9 questions devised by Survey Mechanics and Health Outcomes Insights. These consisted of seven closed and two open ended questions. Completion time for the questionnaire was estimated to be five minutes.

Fieldwork

Fieldwork was conducted by Survey Mechanics between 9th April to 4th May 2020.

All ICG members were initially notified of the survey by email from the ICG office which provided a link to the ICG website where members could complete the survey: <https://surveymechanics.com/s/26745F9> A reminder to complete the survey was sent out by the ICG office to all members on the 24th April 2020.

Data analysis

All graphics with additional analyses i.e. tables were produced using the Survey Mechanics platform.

A combination of word cloud and qualitative content analysis was used for the analysis of both open-ended questions.



Fig 1. Total number of respondents (N = 113) Response rate (43%). Email reminder to all members 24th April 2020

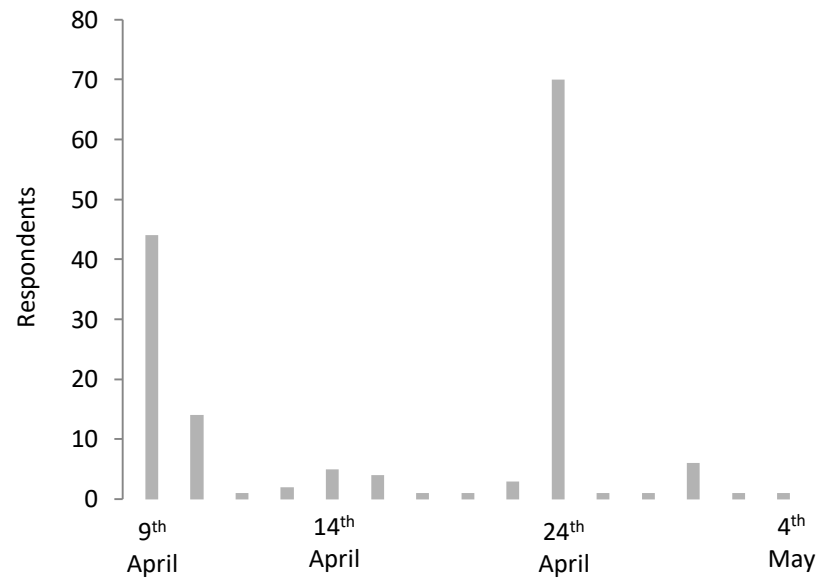


Fig 2. Services provided by members

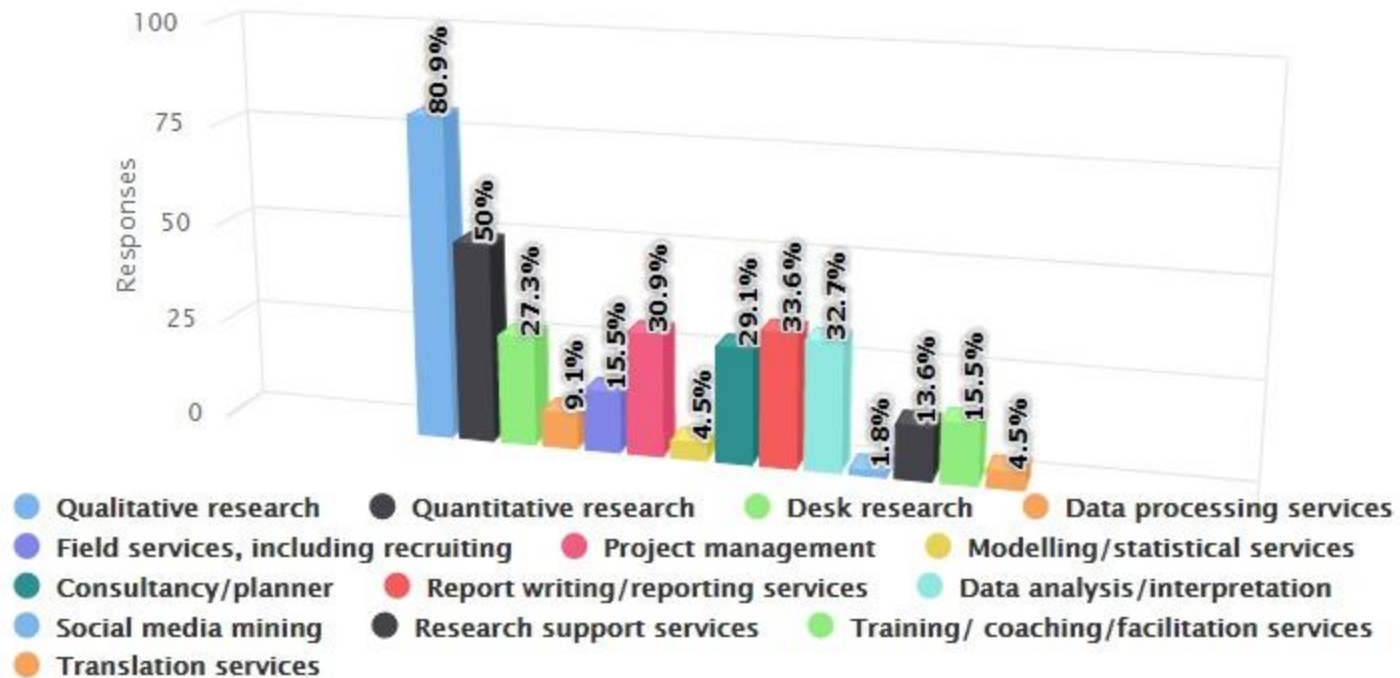
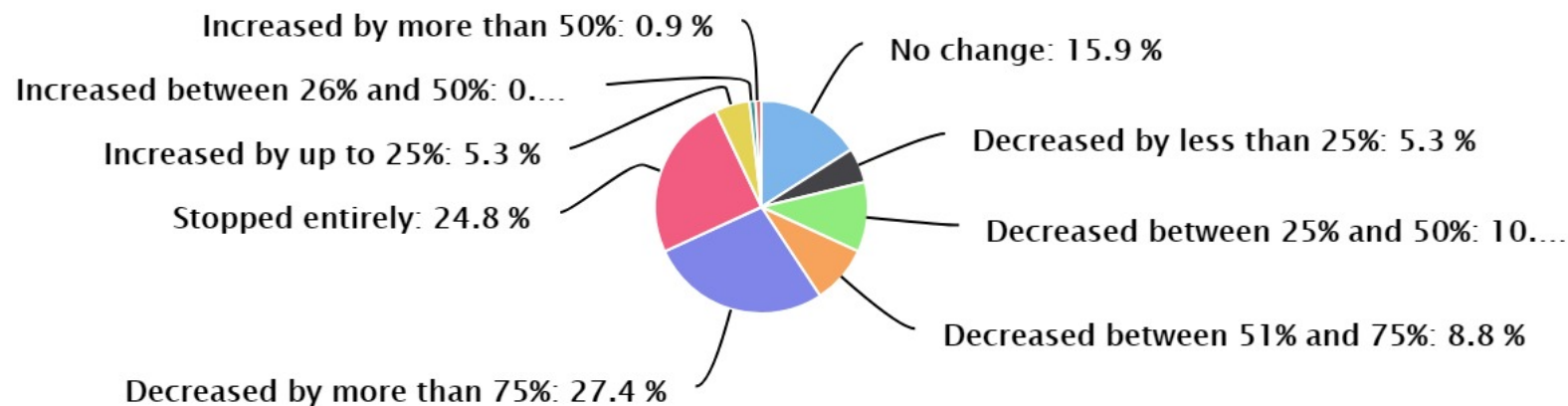


Fig 3. How has your business been affected by the crisis?



- No change
- Decreased by less than 25%
- Decreased between 25% and 50%
- Decreased between 51% and 75%
- Decreased by more than 75%
- Stopped entirely
- Increased by up to 25%
- Increased between 26% and 50%
- Increased by more than 50%

Table 1. Business stopped entirely by type of work.

Qualitative research	88.89%
Quantitative research	37.04%
Report writing/reporting services	29.63%
Project management	22.22%
Consultancy/planner	18.52%
Data analysis/interpretation	14.81%
Desk research	14.81%
Research support services	7.41%
Training/coaching/facilitation services	7.41%

Field services, including recruiting	3.70%
Translation services	3.70%
Data processing services	0.00%
Modelling/statistical services	0.00%
Social media mining	0.00%

Table 2. Business decreased by more than 75% by type of work.

Qualitative research	76.67%
Quantitative research	50.00%
Consultancy/planner	43.33%
Desk research	30.00%
Training/ coaching/facilitation services	30.00%
Data analysis/interpretation	26.67%
Project management	26.67%
Research support services	23.33%
Report writing/reporting services	20.00%
Field services, including recruiting	16.67%
Data processing services	6.67%
Social media mining	6.67%
Translation services	6.67%
Modelling/statistical services	0.00%

Fig 4. How do you think this crisis will affect your practice in the next 18 months, whether this is positive or negative?

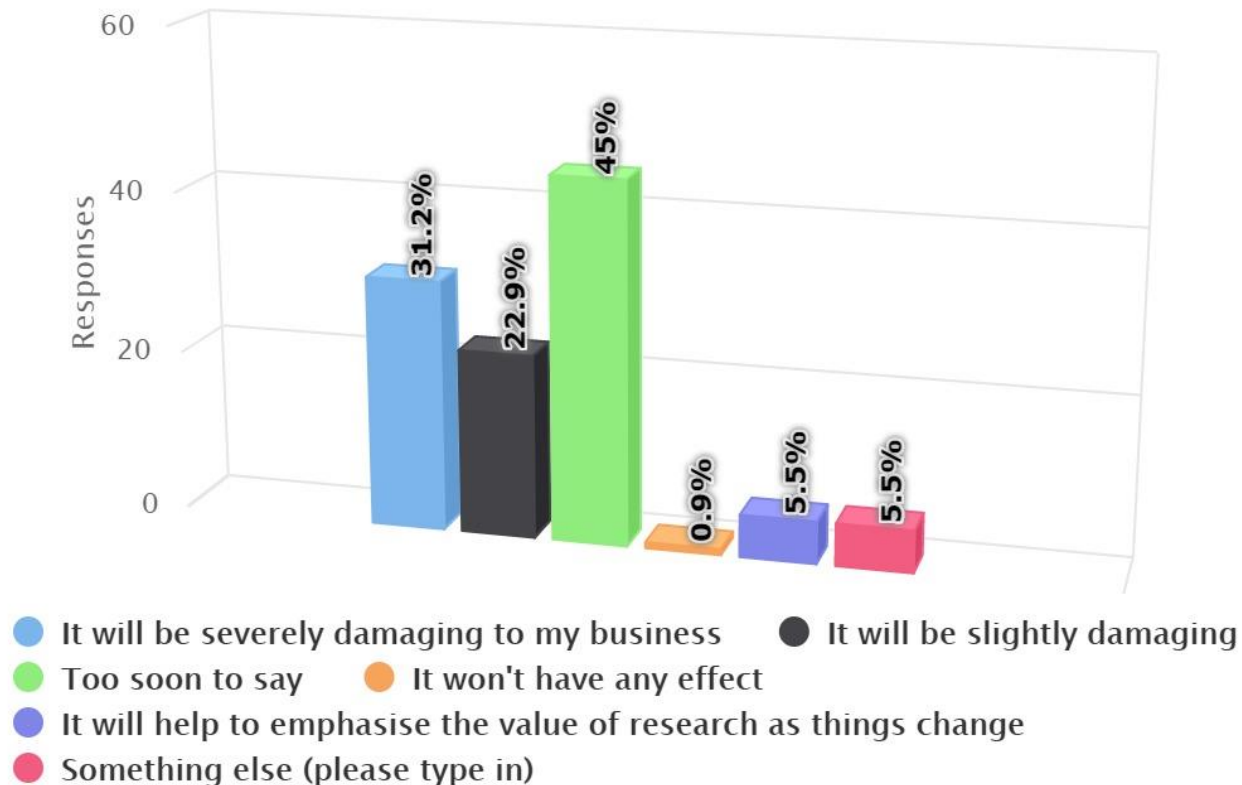


Table 3. Crisis will be severely damaging to the business in the next 18 months by type of work.

Qualitative research	88.24%
Quantitative research	38.24%
Consultancy/planner	29.41%
Report writing/reporting services	29.41%
Training/ coaching/facilitation services	26.47%
Desk research	23.53%
Project management	20.59%
Data analysis/interpretation	17.65%
Research support services	14.71%
Field services, including recruiting	11.76%
Translation services	8.82%
Data processing services	5.88%
Social media mining	5.88%
Modelling/statistical services	0.00%

Fig 5. Do you think the research industry can help the wider economy and society during the crisis?

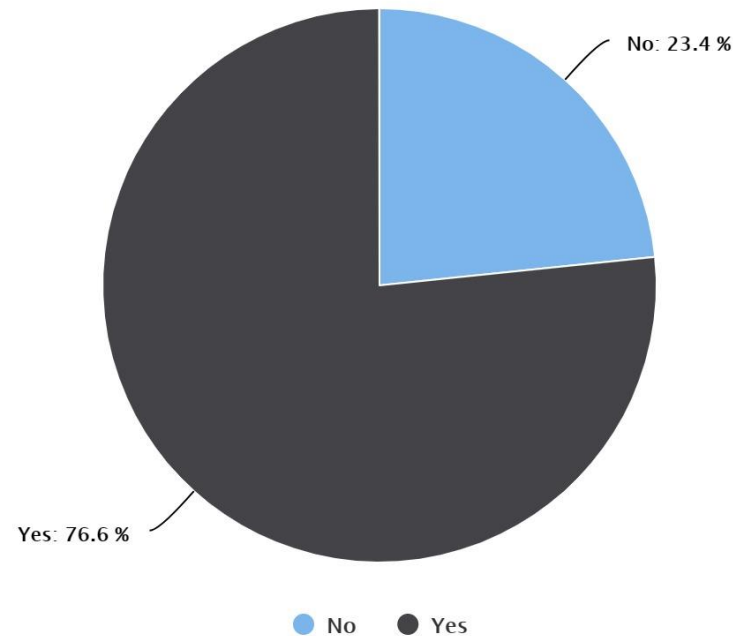


Table 4. Participants answering “NO” to Do you think the research industry can help the wider economy and society during the crisis? by Which market research do you do at all?

Qualitative research	88.00%	Data processing services	12.00%
Quantitative research	44.00%	Translation services	12.00%
Report writing/reporting services	32.00%	Research support services	8.00%
Data analysis/interpretation	28.00%	Training/coaching/facilitation services	8.00%
Project management	28.00%	Modelling/statistical services	4.00%
Field services, including recruiting	20.00%	Social media mining	0.00%
Consultancy/planner	16.00%		
Desk research	16.00%		

Table 5. What lessons can we (the research industry) learn from the crisis - so far and in the future? (See summary for details)

- Online and non-FTF ways of working
- We all need to be very competent at virtual / online qualitative research, and delivering corporate trainings and coaching virtually too
- Diversify client base. Use all the digital tools available
- Need to become agile
- The use of digital resources and smart devices could be used more commonly could reduce the need for face to face research
- We need to all be skilled at online research
- Online is very much the future
- Need to embrace online methods to improve resilience
- That online is not the same as offline. The methodology is different. The output is different. They can complement one another, but not operate in silo.
- Need to upskill to online methods
- We need to be more flexible about methodology
- We need to be more flexible. Find new ways to conduct research We need to ensure we have a wider client base
- Be more flexible and less fixed in our ways. Some qual researchers can barely operate a PC.
- Online research methods
- That face to face research is very precarious. That we need to all be skilled at online research
- Our capacity to work remotely is another critical skill of tremendous relevance for the future of business.
- To be more flexible in our approaches rather than focusing heavily on a single channel i.e. face to face, and be agile in offering other solutions such as telephone, online, etc.

Table 6. How can we future-proof the resilience of the industry to a similar crisis? (See summary for details).

- By being more open and willing to quickly substitute and adapt methodologies to remote ones. I find that most clients are unwilling to make this shift.
- Early warning among ourselves. Flexibility to switch between modes of work quickly know what to advise clients to get their cooperation.
- Impossible, we are dependant on clients
- Encourage clients to trust and empower their MR agencies.
- This is huge. All we can do is make clients aware qual fieldwork can be done online, and remind them that our real value comes in qual "analysis" - which we can do as well now as before.
- Be flexible. Try and integrate yourselves as much as you can with current and past clients so you can be on hand, or called on, in an emergency.
- We are just a tool easily discarded and to future proof a whole rethink is needed on what research is there for and how it can actually generate growth in its own right as opposed to to e.g. assisting others.
- Not only research industry but the whole academic/education sector is going to need online/distance education skills.
- Once the whole Industry has moved to and understood the available technologies, then the resilience will be built in.
- Lobby government to provide support to limited micro businesses in future.
- All my current work is face to face. I need to find some online and telephone work in the future to reduce the risk.
- We are (I'm afraid to say) quite a long way down the food chain and if small companies go bust and big companies draw in their horns spending on why we do is sure to suffer.
- Ideally find a way to convince companies in future that it is not a good idea in a moment of crisis to immediately slash marketing budgets, and within that, to slash research budgets the hardest!
- I believe we can do it by being prepared to switch to alternative methods of working (from home instead of from the office) and why not to take that as something to do on a regular basis from now

The online survey was carried out between the 9th April and 4th May using the Survey Mechanics Platform.

The issues covered in the survey were:

- Business affected by the crisis
- Client behaviour
- Type of work carried out by members
- Main type of members work by members
- Business affected by the crisis
- Ability to contact clients
- Affects of crisis on members work over the next 18 months
- Research industry support
- Lessons to learn
- Future proofing the industry

Response rates

On a daily basis response rates were very low following the day of the survey launch with a daily average of 3.66 responses up to the 24th April.

Response rates peaked on the 24th April to 70 responses following an email reminder to all members but declined to a daily average of 2 until 4th May resulting in a final response of 113 member or 46% of the membership. Response rates to each of the fixed choice questions ranged from 107 (94%) to 113 (100%). while the two open-ended questions were respectively: What lessons can we (the research industry) learn from the crisis - so far and in the future? (N=71, 62%). How can we future-proof the resilience of the industry to a similar crisis? (N= 69, 61%)

While just below a 50% response rate a 46% overall response could be classed as highly successful and most likely be due to participant motivation to complete the survey.

Key findings

In terms of the impact of Covid-19 on members' business, qualitative research services are experiencing the most detrimental affects on their business. While 24.8% of respondents in general having reported business having stopped entirely (Fig 3), this is in stark contrast to the 88.9% of members offering qualitative services. (Table 1). Similarly, while 76.7% of members providing qualitative services reported that business has reduced by more than 75% (Table2) this contrasts with the 27.4% of respondents in general. (Fig 3). Furthermore, 88.2% of members providing qualitative services considered that the next 18 months will be severely damaging to their business (Table 3) compared to 31% of respondents in general (Fig 4). In somewhat contrast, 37% of members providing quantitative services reported that business has stopped entirely (Table 1) and 50% that business has reduced by more than 75% (Table 2). While 38.24% considered that the next 18 months will be severely damaging to their business (Table 3). Across the remaining services, respondents reporting business stopping entirely ranged from 29% - 7% (Table 1) while those reporting being reduced by more than 75% ranged from 43% - 0% (Table 2).

Finally, 76% of respondents considered that the research industry can help the wider economy and society during the crisis. However, positive responses (Yes), were not equally distributed across the service providers. Eighty-eight percent and 44% of qualitative and quantitative research providers respectively reported that the research society could not help the wider community. The remaining providers reporting "No" ranged from 32% - 0%

Seventy-one (62%) of responders provided a response to the open-ended question: What lessons can we (the research industry) learn from the crisis. Comments covered a range of views and opinions relating to the topic. A qualitative content analysis using the key words, online, digital and methodology was carried out on the combined responses. Seventeen comments were identified reflecting respondents views on the importance of moving to online research and being agile. (Table 5.). The remaining statements were too broad to identify any particular theme. (See Appendix 1)

Sixty-nine (61%) of responders provided a response to the open-ended question: How can we future-proof the resilience of the industry to a similar crisis? (Table 6). Comments covered a range of views and opinions relating to the topic. An initial word cloud analysis identified three key words. These were clients, companies and future. A qualitative content analysis using the three key words, was carried out on the combined responses. Fourteen comments were selected for inclusion in Table 6. See Appendix 2 for the full list of comments.

Do you think the research industry can help the wider economy and society during the crisis?

- Lessons to learn are that there are much better ways of sourcing respondents rather than using a recycling traditional Recruiter. This will mean that long term the Qual Sector will be able to hold its head up and tell end clients HONESTLY that what has been said in a Focus Group is accurate and not made up by a load of Groupies. This Virus could not have come at a better time. It will get rid of all the Bad elements in Field and Recruitment in the UK and the Industry will come out of this stronger and a lot more honest. If you want a link to the Groupie London App - happy to send - nearly died when I saw this.
- That the market research industry will have to work very hard to get its message across in the face of so much false information and people peddling 'research' often seemingly free Statistics which is what research is based upon can be interpreted in so many ways by a range of experts that the public ends up potentially believing the wrong analysis Technology will be at the heart of research but requires ever more control over data capture, usage and interpretation
- Our industry is fragile and not positioned as essential Clients are fair weather friends
- That in the greater scheme of things it will be seen as the least essential in terms of positively helping economic regeneration unless there is concrete evidence of how research can contribute. In my many years of research nothing has really changed. In the financial crashes in the 70s and 80s it was research that got cut first from budgets as an added extra and no one has learnt anything in the past so I'm not hopeful anything will be learnt this time round.
- Need to become agile
- Not really sure what they can learn as such.
- I'm hoping this is a once in a lifetime situation so it would have been difficult to plan in advance and unlikely to happen again in the future (Hopefully)
- Too early to say but I wish I'd built up more of a buffer in my business bank account.
- We are at the end of a long decision chain and need to have as much resilience as possible
- Stick together and work toward obtaining help for the industry as a whole.
- The use of digital resources and smart devices could be used more commonly could reduce the need for face to face research
- That thin margins generate reserves that are uncomfortably low when cash-flow is threatened. That we need constantly to be aware of alternative methods, considering, but not beholden to, evolving technologies. That good inter-personal relationships are invaluable when institutional arrangements are under stress.

- We are very vulnerable to viral outbreaks due to the F2F and travel elements for a lot of our work.
- Need to embrace online methods to improve resilience
- Too early to say
- From my own point of view, I have conducted online qual before (bulletin boards) but never synchronous video groups, so this has been a steep learning curve, and reminded me to keep ahead of the game before it becomes urgent!
- REALLY show the £ value
- On-line is OK. Not as good as face to face but meets 80 for 20 rule. On-line brainstorming is not easy and needs help tp really improve systems.
- Need to upskill to online methods Smaller independents offer great value and flexibility.
- We need to be more flexible. Find news ways to conduct research We need to ensure we have a wider client base.
- not sure
- Personally I find the research industry frustrating, it's been going about conducting research in the same way for years - it's largely the fault of the client as they haven't got the balls to try something new, but It's also the fault of the researcher for not having the courage to convince their client otherwise.
- The lesson the industry can learn from the crisis is that TIME is a crucial element in everything. To act at the correct time and take the time to achieve results can have a positive impact or not. Once conducting market research studies, to achieve quality work it is necessary to have the time to do it; often clients wish the results for yesterday and I believe that attitude can be detriment to quality and frustrating all around.(Sic)
- This is about humanity, not business.
- That's more a question for researchers than recruiters
- There are opportunities out there, but hey are limited & we need to be flexible in how we help clients look at research in ways that are out of their comfort zone but will still yield good results. Clients also need reassurance that while people have changed their lifestyles massively, this will most likely be temporary. Moreover, this is still a very recent phenomenon, people are probably very aware of pre-virus habits. In fact, it is actually a great time to understand people because this is like one giant deprivation study, and by working with people to understand the emotions around such recent habit changes, it can shed light on what to do in the future and as the lockdown is slowly lifted.
- As a research industry, have a body that protects sole trader/single (2 people) - mammas and papas type of businesses as these have fallen through the crack completely and many will or are folding.
- As an industry we are in a very precarious position. We need to use the results of the virus on our industry to promote planning. Encourage clients that we need to be researching now to help move things forward.

- Research, like most professions, is neither crisis nor recession-proof. We are also only a few weeks in to the crisis with no visibility of how long it will last nor the likely impact on the other side, but it is apparent from the ICG egroup and Forums that many independents (at least those communicating) are quite fragile with limited, if any, reserves to help them through the dips, let alone the inevitable recession that is coming.
- That online is not the same as offline. The methodology is different. The output is different. They can complement one another, but not operate in silo.
- It puts in perspective what is really important and what is not. It makes you realise that you can never be complacent. It makes me want to concentrate in future on ethical research which has real meaning.
- Little is known about the future of our work following this disruption. Separately, so far we might see some of our learnings as 1) we could have been much further on in developing working practices using online methods of varying kinds. This is now having to be implemented and improved upon at speed. 2) market research society which supposedly works for the research industry should have been much more in tune with potential problems researchers and indies are experiencing, more agile in working for good and their wider community, and have had a more effective 'voice'. Instead that voice is getting drowned out by Marketing Week and big corporate clients.
- We're not a significant player in the world economy
- None - we're all in this together. The only role for the research industry during the crisis is to conduct research related to the crisis itself. Everything else is conjecture. I have listened lately to a lot of people talking on radio programmes about possible exit strategies, societal changes, political changes, economic impact etc. and all these discussions however well-informed the participants, stress the element of conjecture.
- Be more flexible and less fixed in our ways. Some qual researchers can barely operate a PC.
- Most research is not instant in terms of its use and insight. Therefore it is short sighted in the extreme to stop research completely. My main client is an extremely large FMCG company who know and harness the power of research. As of writing this I have in the pipeline 3 jobs SOLELY commissioned to discover the ongoing and long term effects of the virus on the UK consumer H&P. As the old adage goes, you snooze, you lose.
- Advance planning and marketing to build a buffer and have a mechanism to keep in touch with clients and prospects ready for post virus.
- Cash flow is king. Improve business resilience. Buddies matter. Switch to online...
- Online research methods.
- be prepared (just like we are expecting government to be). Research business or not, any company needs to better disaster planning and "what if" scenarios.

- Diversify client base. Use all the digital tools available.
- That researchers need to embrace ALL forms of technology. As do some of our clients. I have been totally appalled at the technological backwardness of some of our colleagues. It really is not good enough nowadays. We can deploy technology to our advantage and should be doing so.
- Try and have portfolio of clients.
- Nothing research-specific, but we need to back progressive political movements that invest in strong healthcare, social security and good pay for essential services.
- How to adapt quickly and still function; not have all eggs in one basket - i.e. F2F quallie! Work with other small brands.
- That face to face research is very precarious. That we need to all be skilled at online research.
- I think the development and adoption of remote technologies is a step in the right direction Our capacity to work remotely is another critical skill of tremendous relevance for the future of business.
- To be more flexible in our approaches rather than focusing heavily on a single channel i.e. face to face, and be agile in offering other solutions such as telephone, online, etc.
- It's too early to say Although I might be being smug, I have been thro' numerous downturns and, being a freelance, have learnt that such an operator should keep a reserve for when things get (very) tough.
- I think we may have shown a lack of empathy for our clients by initially pushing the 'business as usual but now online' message hard. We did not understand as an industry what clients needed at that time. But now, a few weeks in, there are some good, often Qual and video based insights into how consumers deal with the crisis. But again there is a lack of relevance and actionability. Anyone knows people are worried and behaviours have changed massively - clients want to know how to help their business out of the current situation and succeed in future, and I feel we're often just reporting the status quo rather than aus business decisions.(Sic)
- Keep a positive attitude and keep sharing information between businesses and on a personal health basis.
- Too soon to day.
- Collaboration rather than competition; the importance of sharing resources - and the benefits to be obtained Brands are being/will be valued and judged by how they behave now - and after What's really important to people and how they make decisions/behave can change seismically in a very short time - and focus reverts to health, family, home friends and safety We have yet to see how these evolve/become established - tracking - and understanding - change is key Enforced changes bring about creativity, better practices, reflection and real innovation But it's the small independents who are struggling for income - and not supported by the government.
- Need to reinforce online methodologies / interactions (as a back-up plan, I am not at all convince online qual can replace F2F qual).

- That we need to be more flexible about methodology.
- Be diversified.
- I for one will be more proactive in telling clients about the range of research methodologies that are available to them, even if at the time they do not consider these relevant to them. Online communities is an example. I have clients who would not have considered these in the past but are now fully open to the idea (if not yet to spending!)
- Not having all your eggs in one basket.
- To diversify skills to more seamlessly be able to transfer from offline to online in this instance or perhaps even the other way should the Internet collapse! Also whilst specialisms will always be valued, having cross sector experience lowers risk of certain industries and client pool collapsing overnight.
- online and non-FTF ways of working.
- Don't count all of your eggs. No seriously, having a broad spread of clients is important and one that I'm pleased that I have.
- The situation is too early to say
- All ages have been embracing online technologies and exploring new apps, platforms etc. to keep in touch and be entertained has been widespread and reassuring for the future.
- Make sure you have a healthy bank balance! - Be adaptable - keep abreast of new technologies even if they don't (currently) apply to you.
- We need to be as creative as possible - think of other ways we can work.
- We all need to be very competent at virtual / online qualitative research, and delivering corporate trainings and coaching virtually too.
- Working with clients to understand the critical need for research now. Ensuring we all are up to date across all methodologies esp. those who have been working independently and not in a big agency for a long period of time.
- Online is very much the future ... so, being prepared, having the right knowledge and technical set up has never been more important.

How can we future-proof the resilience of the industry to a similar crisis?

- Collect case studies of how brands used insight to help them steer the crisis more effectively (that people can use to encourage other brands to still use insight the next time rather than calling a halt to such work).
- Keep innovating and doing great work that is valued.
- Enlist more allies
- Product testing needs thinking about - safety of respondents and other solutions.
- Qualifications should matter. The MRS needs to get a more prominent position as an expert neutral witness in commenting on major policy issues where evidence matters. Increasing having people who can synthesise across a range of hard and soft data sets in conjunction with AI may be the way major research firms will have to develop. Developing good digital skills will become an essential part of the overall skill set needed; developing a network of contacts as always will be vital and ideally developing a specific area of expertise.
- We need to constantly reinvent ourselves and offer great value (great value does not mean cheap rates).
- One issue is how many clients are using these circumstances to pull down fees etc. and a lot of consultants / companies are under pressure to give in. This happened in the last economic crash and I don't think we ever got back to where we were. At the end of the day it is the foot soldiers - the fieldworkers that end up taking the hit. Even the amount clients want to pay for incentives was always under pressure but seeing this even worse in some cases.
- Never be a Ltd company.
- We can't, it is dependent on the crisis for instance if we were at war there would be no industry at all, it would have to start again once the war finished, the same with any pandemic who is to say that this will not come back again in this form or that it mutates into another type of resistant virus.
- Support small businesses Network Join forums / groups.
- The old story - not race to the bottom cost-wise.
- Early warning among ourselves. Flexibility to switch between modes of work quickly know what to advise clients to get their cooperation.
- By being more open and willing to quickly substitute and adapt methodologies to remote ones. I find that most clients are unwilling to make this shift.
- I have no idea.

- Be prepared, more knowledgeable.
- Unsure
- Start feeling easier with the unknown. Start trying new things. Start admitting where the faults lie: - Samples (quant + qual) are often biased as they do research all the time - Not everyone feels comfortable talking in a research group and that isn't a problem, just find another way to talk to them -> it's not an accurate representation of the audience.
- I really don't know - wish that I did!
- Create a body that protects these small independent consultants (mamas and papas).
- Find more secure ways to have conversations with consumers that are not face to face (Zoom security is a worry).
- You can't
- Ensuring commissioners understand the potential of research BEFORE a crisis hits, as we're not going to get anyone's attention during the crisis.
- Become more proactive and establish ourselves as a "key need" that businesses cannot afford to do without - Become a must have.
- Future proofing is impossible.
- Show how reducing/stopping research is short sighted and has medium and long term consequences.
- .. but what if the next crisis hits power and/or data transmission systems? Reducing spare capacity looked like a clever cost-saving wheeze in public admin, industry and commerce. But it has bitten us on the bum big-time. There is a price to be paid for low prices, low taxes and glib three-word slogans.
- Impossible- with so much uncertainty and a rapidly changing situation, there can be no justification for companies to spend money on market research to answer conventional questions, when there is little prospect of being able to exploit the results. In addition to this, finding people to interview (etc.) is far more difficult now and there would be grave doubts about the validity/relevance of any responses they give, given the aforementioned backdrop of uncertainty and change.
- I'd suggest every ICG member takes advantage of the current (free) support/ time being provided by financial and legal experts to up their financial management game in order to be ready for the new normal/ abnormal...
- No idea
- Impossible, we are dependant on clients
- Lobby government to provide support to limited micro businesses in future

- By emphasising the need to stay ahead of the game.
- Too early to say. We aren't entirely sure what the outcome is yet.
- Much of my work is contracted. It has been suspended but I'm fairly confident it will resume. Long term contracts are therefore one way of future proofing. Eggs and baskets, all my current work is face to face. I need to find some online and telephone work in the future to reduce the risk.
- Understanding the above learning in depth and develop disaster strategies that aim to do it even better Look after the abandoned people who are the bed rock of the industry - recruiters, freelancers, self employed, small companies who don't get furloughed, don't get 80% of their salary from the government and yet have years of experience and skill behind them Making use of technology but not forgetting the human side. Online communication with a real person yields better value insights and understanding than a cheap auto bot-administered 'survey'.
- Cross platform and sector training.
- Broad client base.(Sic) Be flexible. Try and integrate yourselves as much as you can with current and past clients so you can be on hand, or called on, in an emergency.
- Not completely. We are (I'm afraid to say) quite a long way down the food chain and if small companies go bust and big companies draw in their horns spending on why we do is sure to suffer.
- Not sure
- Once the whole Industry has moved to and understood the available technologies, then the resilience will be built in.
- Ideally find a way to convince companies in future that it is not a good idea in a moment of crisis to immediately slash marketing budgets, and within that, to slash research budgets the hardest!
- As above, promoting the range and flexibility of tools and methodologies that are available.
- Not sure
- Promoting the range and flexibility of tools and methodologies that are available.
- That's more a question for researchers than recruiters.
- Show how we can be creative in offering non face to face solutions.
- Working together in sharing information and making suggestions to help one another rather than trying to score points in gaining business away from others.

- Impossible to say at the moment.
- Consider a bit of diversified portfolio of work. For example, I am a part time academic. I have heard that some large companies are looking for freelancers at this time as some of their full-time employees are not geared up for 'working from home' and the companies can't undertake proper hiring. May be free-lancers have the opportunity to leverage their proven ability to work from home. It is suddenly something we can boast of rather than be shy of. Not only research industry but the whole academic/education sector is going to need online/distance education skills and those of us ahead of the curve via our online qual research expertise can look at opportunities to leverage this inherent trade skills in corporate training/ education sector.
- Encourage clients to trust and empower their MR agencies.
- There is nothing you can do really. This is huge. All we can do is make clients aware qual fieldwork can be done online, and remind them that our real value comes in qual "analysis" - which we can do as well now as before.
- I don't think you can
- Not sure we can.
- Don't know
- Freelancers need to create a financial reserve for themselves (easier said than done).
- Go more online, offer, smaller, dip in the water research.
- Facilitate ICG people working together more effectively to provide thought pieces that stimulate demand. Probably some more financial management training so people can make sure they have the resources to withstand another shock. Potentially the ICG can act as a stronger thought leader, tapping into people's combined resources, to promote independent researchers via great think pieces in key publications, such as Marketing.
- I believe we can do it by being prepared to switch to alternative methods of working (from home instead of from the office) and why not to take that as something to do on a regular basis from now onwards for those who need, prefer, etc doing it with full capability. To be more open and supportive of the use of different research methodologies, giving each single one the adequate studies, avoiding to choose faster and cheap all the time, jeopardizing quality and the opportunity to gain in depth. Another aspect is to create systems to cover some functions if someone is ill, who replaces who, what is critical to be attended to and to prioritize jobs.
- Lots of training, lots of awareness, lots of proactivity.

- This is really difficult to answer - I suppose the fact that we are a supportive network is really important. We are (and have been_) supporting each other emotionally and with offers of help (e.g. free services, exchange of information etc.). It is easy to become insular when we are busy but we cannot afford to be. also I think the crisis has exposed weaknesses in our industry in terms of our professional body (I am talking about the MRS) which should be campaigning on our behalf. I am a full member, but have only received one email directly from them which encouraged me to renew my membership. I know that they are doing a lot in the background but they are not communicating this effectively.
- You can't
- This is a big ask when this is a service industry that does not itself generate economic growth or resilience. We are just a tool easily discarded and to future proof a whole rethink is needed on what research is there for and how it can actually generate growth in its own right as opposed to eg assisting others.

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