



COVID-19 Member Survey

Wave 5: April 27-May 17, 2021

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

LANDSCAPE

With the first half of 2021 almost over, it's amazing to look back and see how far we've come over the course of a year. With vaccine eligibility open to everyone 16 and up in the U.S. and President Biden pushing for 70% of adults to be vaccinated by July 4 (Simmons, 2021), many families and businesses are looking forward to summer, travel, and getting back together socially and professionally. Mandatory mask mandates are beginning to fall away, more businesses are reopening and hungrily recruiting for new talent, and a feeling of hope is in the air. While COVID-19 cases still linger and the threat of new variants hits news headlines, most of us are enjoying the return and rebirth of everyday living.

From an insights industry perspective, we continue to strive for a healthy balance of providing valuable consumer behavior updates, as well as protecting the health and recovery of our own workforce during this transitional time. In March of 2020, as many states were getting their first coronavirus cases, the Insights Association, in partnership with Quester, Infotools, and Gongos, decided to field a survey to members to measure the impact coronavirus has had on their business. A second wave was fielded in April, a third wave in June, a fourth wave in mid-September to mid-October, and now a fifth wave, over a year after all this began, from late April to mid-May of 2021. In all waves, Insights Association members from corporations, full-service agencies, and data collection agencies who work in qualitative, quantitative, software, and/or analytics were surveyed.

- Wave 1: Fielded March 18-19, 2020
- Wave 2: Fielded April 6-7, 2020
- Wave 3: Fielded June 17-July 4, 2020
- Wave 4: Fielded September 14-October 15, 2020
- Wave 5: Fielded April 27-May 17, 2021

It's important to understand the key milestones of the pandemic at each of these points of fielding. During the time of fielding Wave 1, most states had declared a state of emergency, but had yet to enact 'shelter in place' orders. By Wave 2, most states had 'shelter in place' orders and the \$2 trillion stimulus package had been signed. By June, when our Third Wave was fielded, many 'shelter in place' orders were being lifted, but after months of the economy at a standstill, the gravity of the impact was still being felt. During the time of Wave 4, COVID began to spike again and states struggled to balance keeping families safe and the economy open, doing so with open-capacity guidelines and enduring mask mandates.

The current wave fielded after a six-month period of nationwide recovery efforts – both financially and physically. It focuses on the impact of COVID-19 in Q1 of 2021 and how members feel about its continued effects. After two more rounds of stimulus payments and the release of three COVID-19 vaccines, people are starting to feel like they can breathe for the first time in a year. While COVID-19 will never be fully eradicated, measures are in place to transition families and businesses from surviving to thriving in a climate with COVID-19.

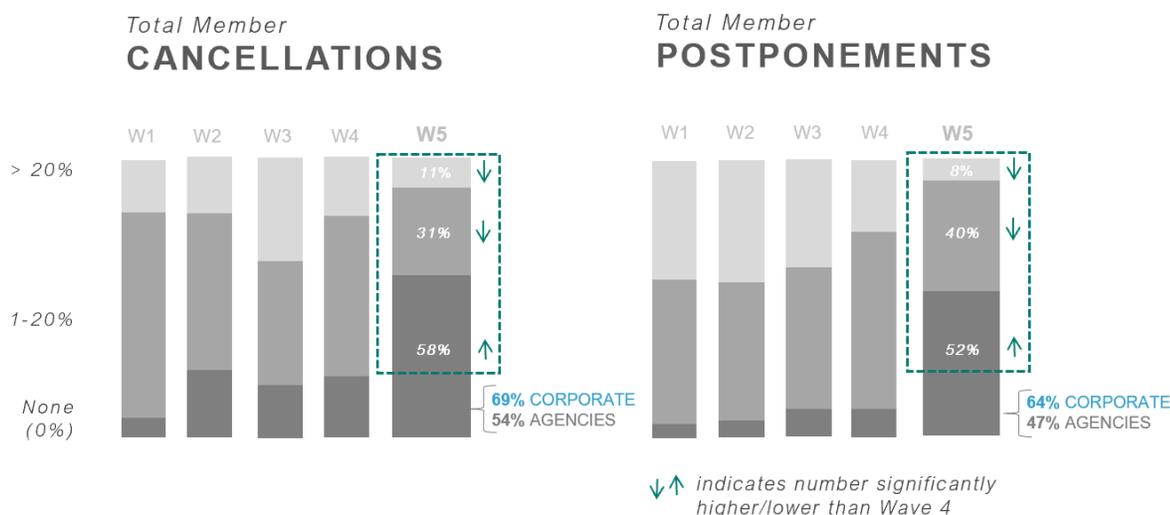
OUR FINDINGS

WORK OUTLOOK: MORE GROWTH AS NEW WORK OVERSHADOWS IMPACTED WORK

For the first time in over a year, members reporting no project cancellations or postponements as a result of coronavirus outnumber members still experiencing cancellations or postponements. This is a significant change from Wave 4 (See Figure 1), and a consistent pattern among agencies and corporate members. Sixty-nine percent of corporate members and 54% of agencies are reporting no cancellations. Among those who are still experiencing cancellations, 48% are full-service agencies, 28% are data collection agencies, and 21% are corporate members. This likely is further evidence that corporate members are staffing projects internally and being more selective about what they outsource and who they outsource to.

Figure 1.

% EXPERIENCING CANCELLATIONS & POSTPONEMENTS

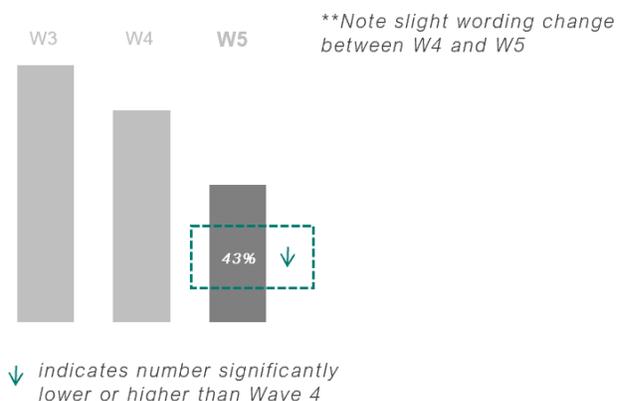


Of the workstreams that remain impacted, all types of work continue to be included: both qualitative and quantitative. When it comes to qualitative research, we are seeing many agencies continue to adopt digital qual as the new standard. Sixty-three percent of those who used to do mostly in-person qualitative before COVID-19 and 83% of those who were doing equal qual and quant are doing mostly digital qual today, over a year after the pandemic began. We know more in-person work will resume as travel restrictions gradually lighten and vaccine distribution spreads, but the efficiency and widespread adoption of digital will likely remain.

With project cancellations and postponements improving, concerns about the future are quick to follow. While 43% of members are reporting to be still somewhat or very concerned about the future outlook of their business, this is significantly down from 66% in Wave 4 (see Figure 2).

Figure 2: Total Member

SOMEWHAT OR VERY CONCERNED ABOUT FUTURE OUTLOOK**



Not only do minimal to no project cancellations instill hope in the future, but so does a healthy work pipeline. Sixty-five percent of agencies and 92% of corporate members report their work pipelines are back to where they were or better than pre-COVID-19.

Although many feel the burden being lifted, it is important to know that the recovery journey doesn't look the same for everyone. There are still some struggling with both tangible and intangible obstacles. The tangible obstacles come in the form of lighter project pipelines – 36% of agencies still report their pipelines as being lighter than they were pre-pandemic. With some corporate members staffing projects in-house, it will be important for agencies to diversify and find new ways to create a healthy workflow in the future. The intangible obstacle is the growing sense of caution or unease – 31% of those who say their pipelines are the same or better than they were pre-pandemic are still concerned about the future. Only time will tell if this new cautious attitude will remain or fall away as recovery continues.

TRAVEL OUTLOOK: IN-PERSON WORK AND MEETINGS ARE MAKING A SLOW COMEBACK

Travel is back for many businesses, both corporate and agencies, although to varying extents. Fifty-six percent of members report their companies are allowing travel, which is up significantly from 34% in Wave 4. Of those allowing travel, most policies extend to business-critical travel, with 85% enabling project-related travel only, 28% approving non-project related meetings, like account or supplier visits, and 15% allowing travel for conferences and events.

If President Biden accomplishes his goal of 70% of adults being vaccinated by the 4th of July, it is likely more company travel bans will fall off and all types of travel, project or not, will be cleared. Yet, as it stands, every company is taking their own approach to identifying when and how they will allow employees to travel.

As a whole, corporate members are sticking by and supporting agencies who choose to remain virtual. Eighty-eight percent say they're okay partnering with suppliers who choose to continue with virtual work only. However, 12% of corporate members are expecting their suppliers to travel if work requires it. Regardless of where a company stands on the issue of travel, future conversations between both parties will have to be carefully navigated to make sure everyone is comfortable, and no wrong assumptions are being made before contracts are signed or work is awarded.

OPERATIONAL OUTLOOK: SAFETY MEASURES REMAIN IN PLACE WHILE BUSINESSES TAKE ACTION TO RETAIN THEIR WORKFORCE

With cancellations decreasing and brighter pipelines on the horizon, many businesses are just trying to get back to normal office life. Fifty-seven percent of agency members and 39% of corporate members returned to the office in Q1 of 2021. Those who are back in the office are taking measures to not only keep staff safe but also happy and fulfilled in their careers. Safety measures being implemented include making extra hand sanitizer and cleaning supplies available (33%), requiring masks in the building (29%), socially-distanced desks (24%), limiting the number of people in the building (18%), doing temperature checks at the door (15%), only allowing critical staff in the building (15%), and removing self-serve food or drinks (12%). To help retain staff and compensate them for all the hard work done throughout the pandemic, companies are implementing new or increased work-from-home policies (23%), creating new flexible working conditions (hours, childcare, etc.) (15%), offering expanded health and wellness benefits/resources/support (15%) (more so amongst corporate (26%) than agency members (11%)), and a few additionally mention they are even hiring new staff or giving bonuses/raises.

INDUSTRY IMPLICATIONS: ACKNOWLEDGING AND SUPPORTING ALL RECOVERY JOURNEYS

As growth continues to lift up our industry, it's important to remember that this is not one-size-fits-all. Everyone's recovery journey looks different, and many businesses are facing years before returning to a place of financial health and prosperity. As we look ahead to the second half of 2021, we need to approach it with hopeful caution, an empathetic spirit, and a creative mind to assist our insights community in navigating what lies ahead and thriving in the near future. We encourage our members to continue prioritizing safety and fairness in all interactions and enjoy celebrating and sharing new knowledge and innovations as we begin to embark on a new chapter of consumer insights. A few thought starters:

- Keep safety top of mind in project design and new office policies. Loop in employee voices to make them a part of the solution.
- Practice patience with employees and their opinions/acceptance on the subject of the vaccine.
- Transition your mindset on the subject of virtual. Evolve it from a band-aid approach to a longstanding capability of the company, using it as an opportunity to glean a new layer of insights left untouched by traditional methods.

- Be open-minded with partners who still have travel restrictions in place. Don't reject the partnership outright, instead exploring comfort levels with careful conversations.
- Find ways to elevate the employee experience so they not only feel compensated for their hard work but also valued as an important voice of the organization.

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 [job board](#) is a helpful resource in addition to those included below. We are committed to serving our members as best as possible and supporting them in their individual journeys.

ADDITIONAL RESOURCES

Tips for recovery during COVID-19:

[Coronavirus Information & Resources | Insights Association](#)

[Insights Association Issues Reopening Guidelines for Insights Businesses | Insights Association](#)

[Exercise Starter Kit for Workshop on Reconstituting Operations | FEMA.gov](#)

[What Will it Take to Come Back? - Dynata](#)

References

Simmons-Duffin, Selena, Talbot, Ruth, Wilburn, Thomas, Wroth, Carmel (24 May 2021). "How Is The COVID-19 Vaccination Campaign Going In Your State?"

[COVID-19 Vaccine Tracker: How Many People Have Been Vaccinated In The U.S.? : Shots - Health News : NPR](#)