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# THE GLOBAL COVID-19 EFFECT ON MARKET RESEARCH DATA COLLECTION





# INTRODUCTION

**The** novel coronavirus has disrupted the entire world, and the market research industry has not been immune to these consequential changes.

**As** part of Dooblo's ongoing efforts to contribute and give back to our research community, we created this survey to obtain an honest and insightful overview of how the market research industry has been affected by COVID-19 and what the industry's professionals project about its future. Our study focuses on how coronavirus has impacted data collection methods and how it is expected to affect market research in the short term, as well as after the pandemic recedes. It also provides insights about how companies might be able to alleviate some of the challenges created as a result of the pandemic.

**The** results are contained in this report, which we hope will serve as an important resource to you as we navigate through these challenging times toward a brighter future.

# TABLE OF CONTENTS

KEY TAKEAWAYS ..... 4

ABOUT THIS REPORT..... 5

THE COVID-19 IMPACT..... 7

GROWTH DURING COVID-19 ..... 11

THE NEW NORMAL..... 13

THE POST COVID-19 WORLD ..... 15

MAKING ADJUSTMENTS ..... 17

FINAL THOUGHTS ..... 19

# KEY TAKEAWAYS

## COVID-19 HAS HAD A DRAMATIC EFFECT ON MARKET RESEARCH ACTIVITY.

More than four-fifths of respondents reported that **market research activity has decreased** and 16% reported a decrease of activity of between 80–100%.

## GROWTH DURING THESE TIMES CAN BE ACHIEVED.

**Eight percent of respondents reported a rise in activity** because of increased demands for new research projects as a result of the pandemic and recurring projects that require more frequent data under the current environment.

## FLUCTUATIONS IN ACTIVITY VARY BY BOTH LOCATION AND INDUSTRY.

In North America, **34% of respondents reported that their activity remained the same or increased**, compared to Africa, where that number was only 13%. Similarly, the rate of decreased activity varied by industries, with the highest rate (96%) among companies that perform market research in the retail industry.

## DATA COLLECTION METHODS ARE CHANGING, BUT CHALLENGES OF SHIFTING MIGHT MAKE THE CHANGES TEMPORARY.

Because of COVID-19, about three-quarters of market research professionals have **made changes to their data collection methods**, but 66% found these changes to be challenging. Moreover, nearly 70% of respondents reported a **drop in CAPI response rates** during the pandemic, but about the same number said that **safety measures such as gloves and masks** would increase CAPI response rates in the post COVID-19 world.

## RESPONDENTS EXPECT A RETURN TO NORMAL IN THE NEAR FUTURE, ALONG WITH GROWTH.

Three-quarters of respondents predicted that after COVID-19, their **market research activity would either remain at the same level or increase**, and 34% believed that they would return to normal activity between four to eight months.

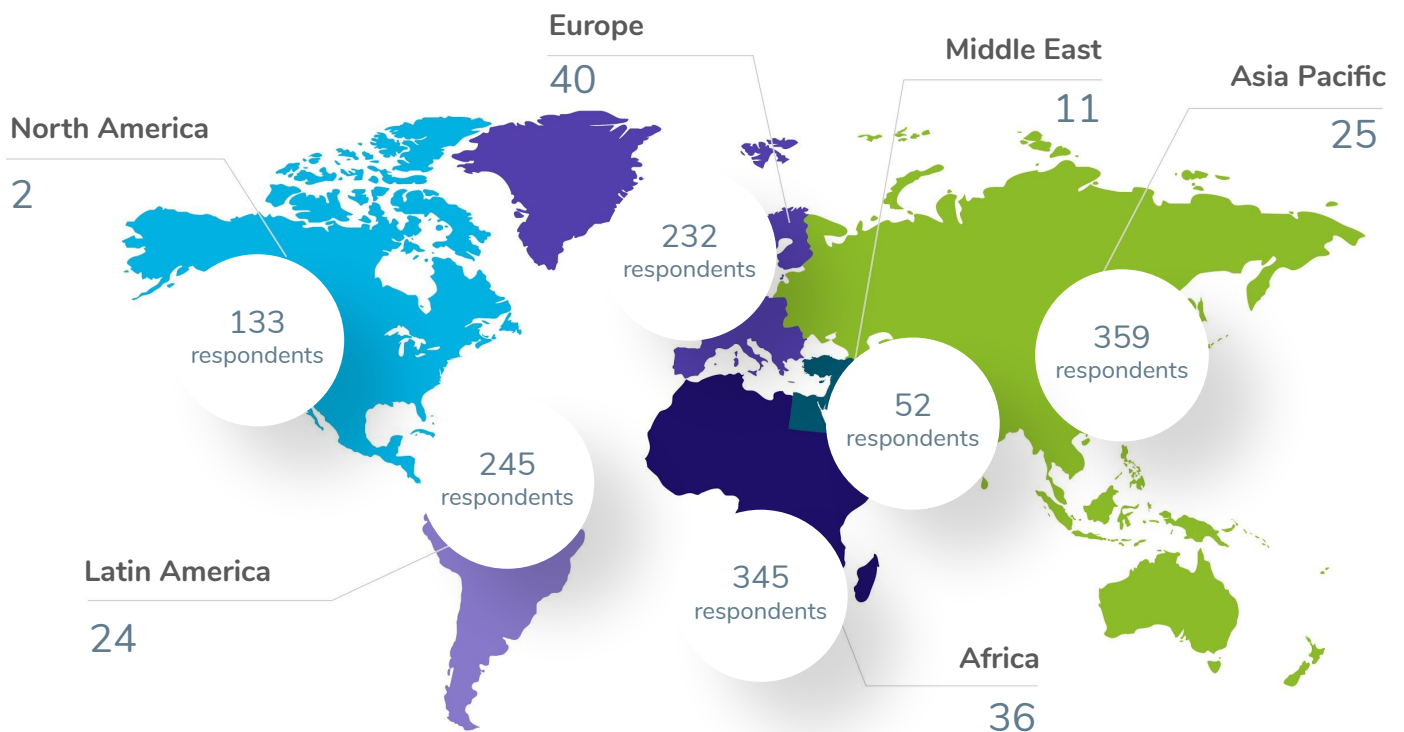
# ABOUT THIS REPORT

THE GLOBAL COVID-19 EFFECT ON MARKET RESEARCH DATA COLLECTION SURVEY GATHERED INSIGHTS FROM 1,657 MARKET RESEARCH PROFESSIONALS IN 138 DIFFERENT COUNTRIES.

The respondents included a wide range of market research professionals, including executives, data analysts, fieldwork directors or managers and more, working in organizations that conducted anywhere from several hundred to tens of millions of surveys annually. These companies were primarily commercial market research firms, but also included government agencies, academia, fieldwork services firms and nonprofits. In addition, they served a wide range of industries, including governments, automotive, retail, financial services and healthcare.

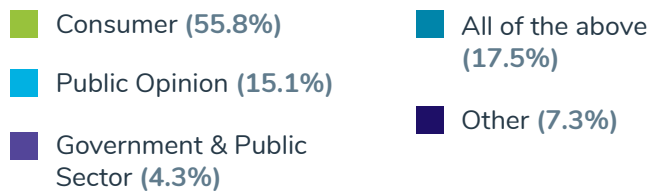
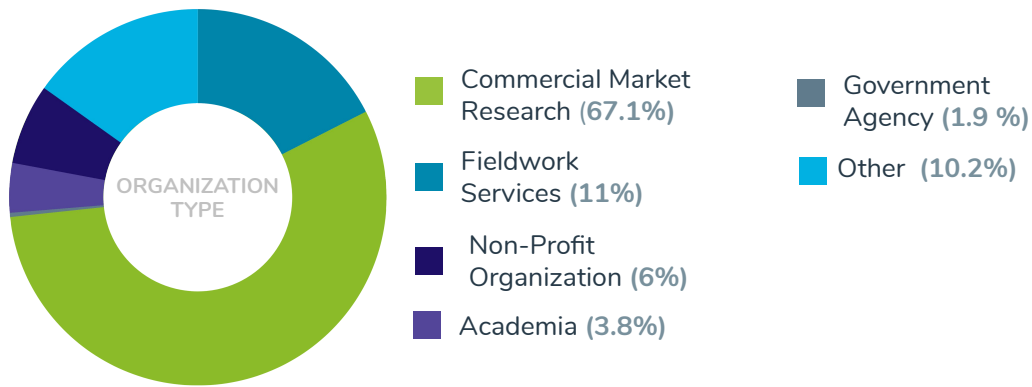
## SURVEY DEMOGRAPHICS

### 1,657 RESPONDENTS FROM 138 COUNTRIES

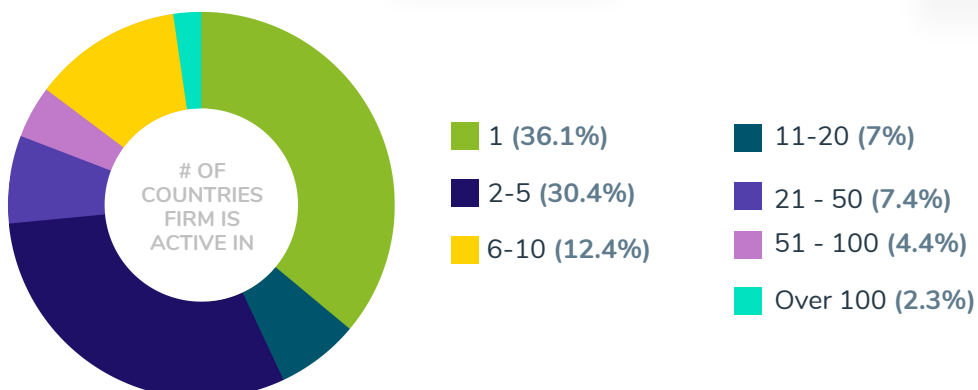
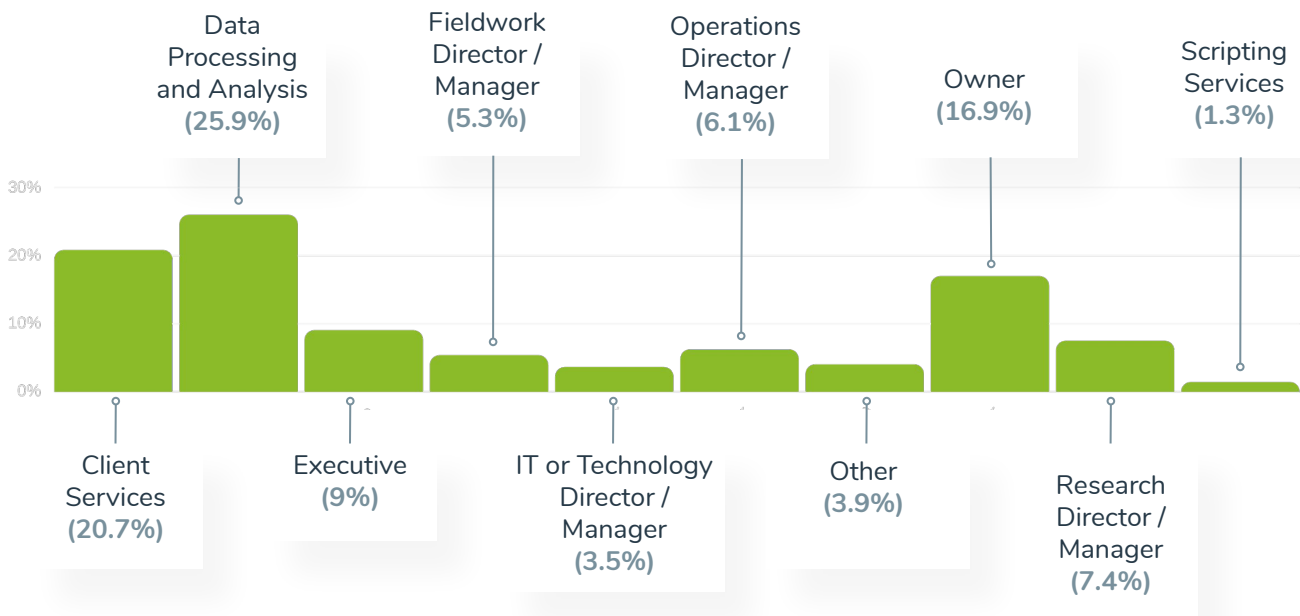


\* Respondents from undisclosed countries: 291

## MARKET SEGMENTS AND RESEARCH TYPE



## ROLE WITHIN THE ORGANIZATION



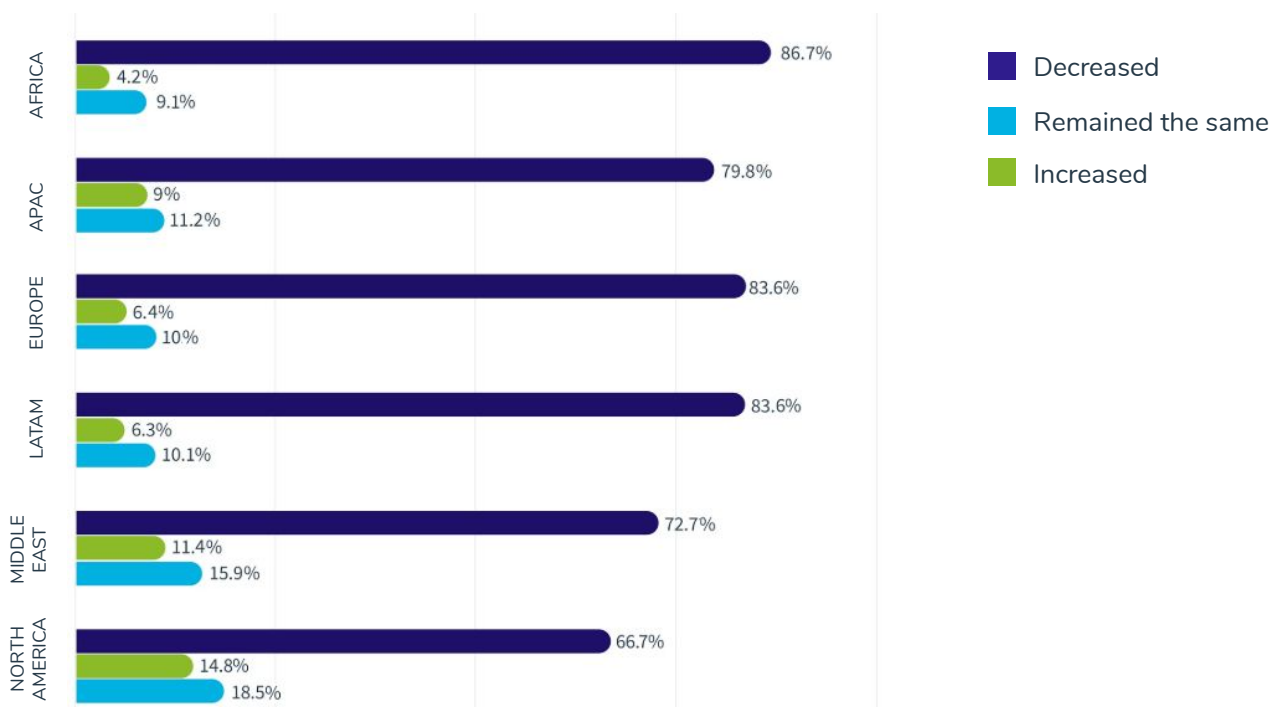
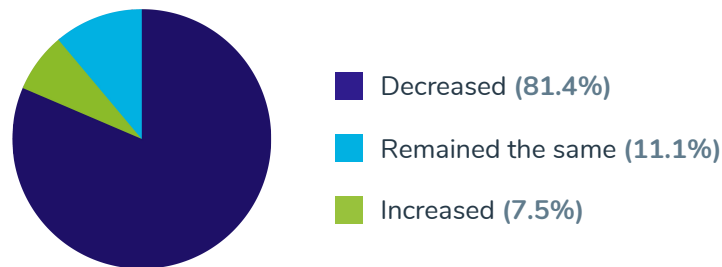
# THE COVID-19 IMPACT

## DECREASE IN MARKET RESEARCH ACTIVITY

Coronavirus has caused economic havoc all over the globe, and our survey confirmed that the market research industry was not spared. More than four-fifths of our respondents reported that their market research activity has decreased during COVID-19.

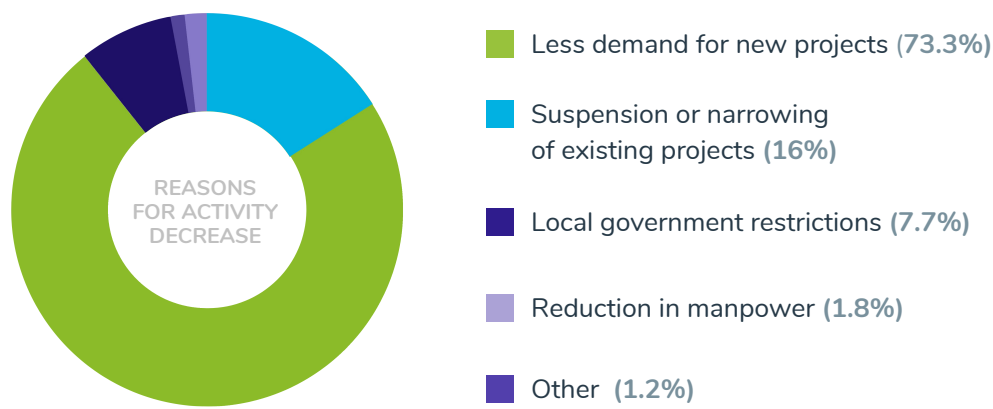
The rate of decreased activity varied by location and industry. **Africa was the hardest hit, with decreased activity of 87%, followed by Europe and Latin America**, both with decreased activity of 84%. As far as industries, the lowest rate of decrease was **67%** in companies that perform market research in the IT and telecom sector. Because of the toll that COVID-19 has taken on the retail industry, it's not surprising that the highest rate of decrease, 96%, was seen in market research companies working in that sector.

## IMPACT OF COVID-19 ON MARKET RESEARCH BUSINESS ACTIVITY

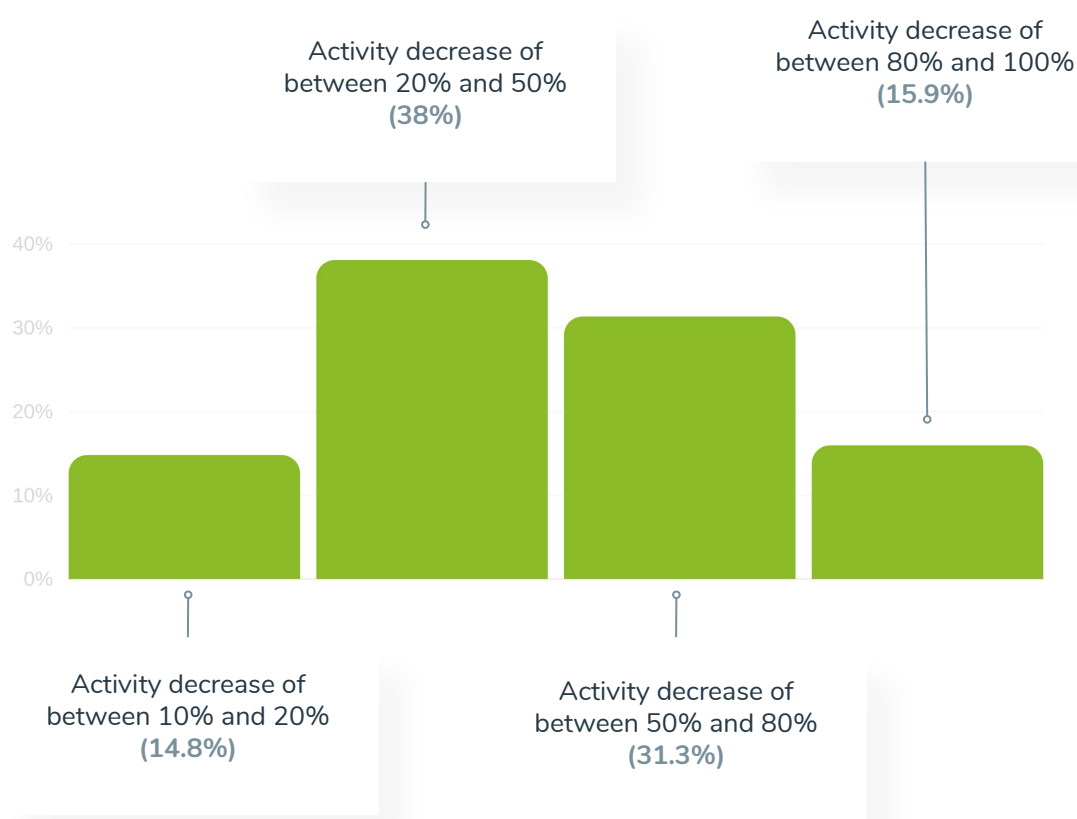


# REASONS FOR DECREASE

Seventy-three percent reported that the main reason for the reduction was because of less demand for new projects, primarily because of reduced market research budgets. The magnitude of reduction was also significant, with 16% reporting a decrease in activity of between 80–100%.



# MAGNITUDE OF DECLINE OF ACTIVITY





## DECREASES IN RESPONSE RATES

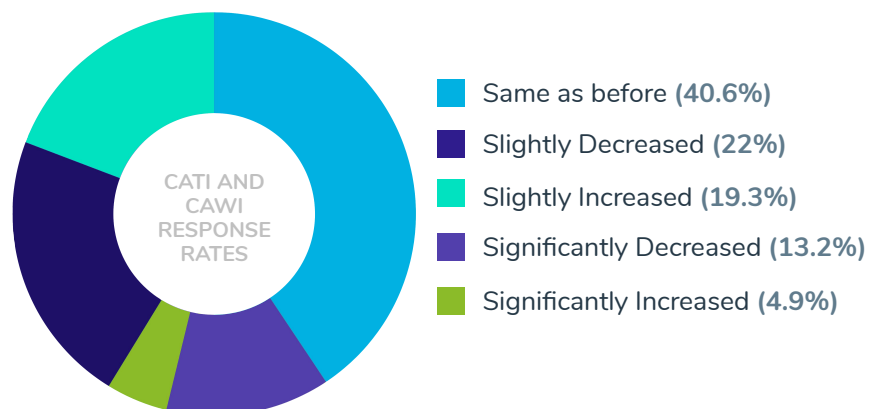
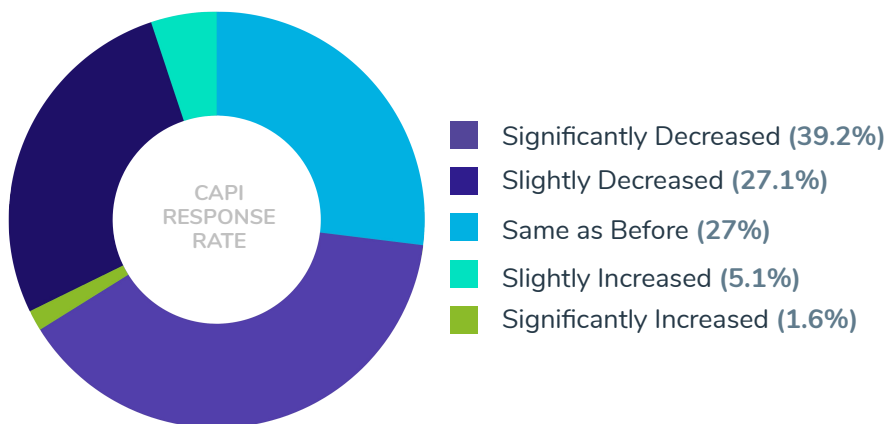


**“Respondents are not ready for face-to-face interviews because of the situation. There are a lot of restrictions from the government as well.” — India**

It's clear that coronavirus has greatly impacted data collection using CAPI. In a nod to the new challenges of trying to conduct face-to-face surveys in a world that is practicing social distancing and wearing masks, nearly 70% of respondents reported a drop in CAPI response rates during the pandemic, including 39% that said the drop was significant.

As reported by 64% of respondents, the main reason for the decrease in CAPI response rates was as a result of lockdowns preventing surveyors from being sent to the field. This was followed by an additional 32% who reported reluctance to participate in face-to-face surveys, both from those conducting and those responding to it.

By contrast, just over a third of respondents saw a drop in CATI and CAWI response rates, while 41% indicated that COVID-19 had no effect on CATI and CAWI at all.



## SWITCHING METHODS

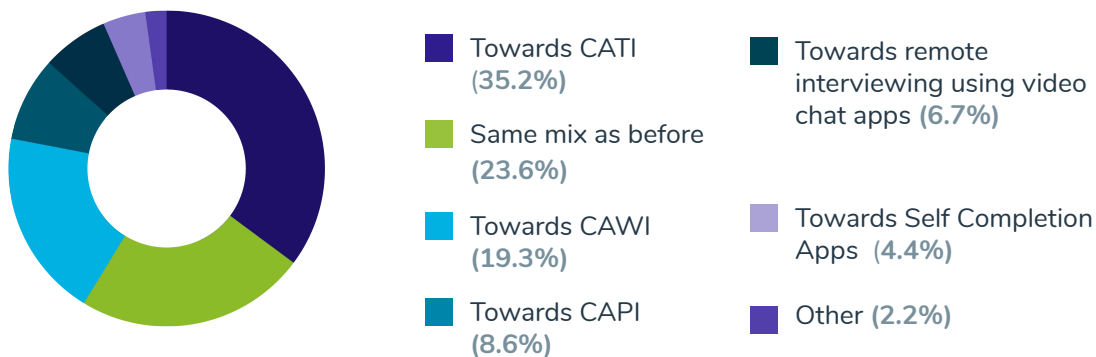
For many market research professionals, the pandemic spurred changes to data collection methods. Of those surveyed, just 24% reported keeping their data collection methods the same, while more than half said that they increased either CAWI or CATI methods.

Yet these adjustments in survey methods have proven to be quite difficult for many, with 66% describing them as challenging, very challenging or almost impossible. Shifting to online and telephone data collection requires a new infrastructure often lacking in smaller companies, such as engagement with panel companies, call center operations and others to provide access to remote respondents. This raises the question whether these changes will remain in the post COVID-19 era.



**“More quality data is available through face-to-face mode, as the respondent is directly under the control of the enumerator. With CATI interviews, there’s less control. The respondent can terminate the session by pressing a button and dropping the call.” — Pakistan**

### CHANGES IN DATA COLLECTION METHODS



### THE CHALLENGE OF THE TRANSITION

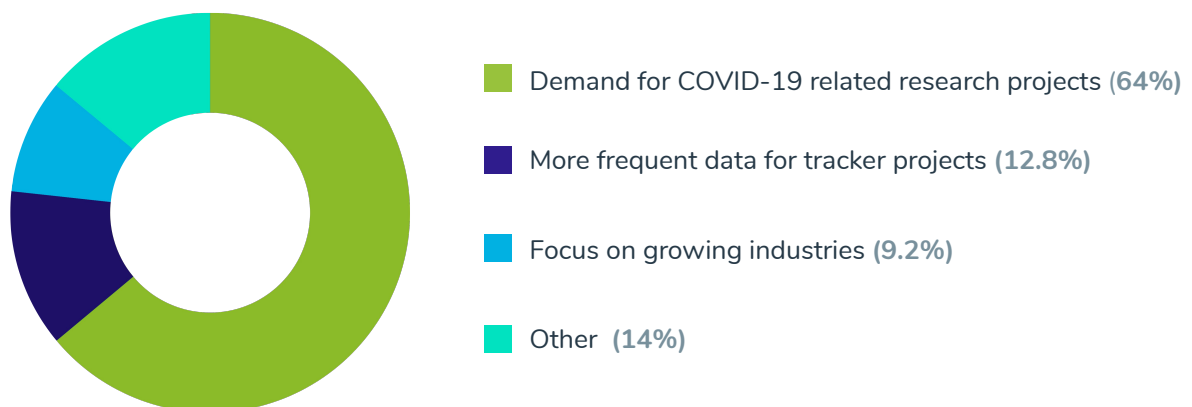


# GROWTH DURING COVID-19

How do market research firms grow during these challenging times? Those who are doing well provide clues: Eight percent of respondents from various industries reported that their activity rose, and 64% attributed this growth to increased demand for new research projects because of the pandemic. Ironically, these firms appear to be coping with COVID-19 by focusing their work on it. In addition, 13% of those who reported growth during the pandemic attributed it to tracker projects where the client requires more frequent data.

There was also a notable difference in increased activity that seemed to be tied to location. In North America, 34% of respondents reported that their activity remained the same or increased. In Africa, however, only 13% saw activity rising or remaining the same (see page 7). A possible reason for this could be that firms in North America may receive more government support and enjoy a more stable economic environment to support market research than the developing world.

REASONS FOR MARKET  
RESEARCH ACTIVITY GROWTH



## INCREASED RESPONSE RATES



**“Data integrity is the most important thing.” — Indonesia**

Seven percent of respondents (see page 9) reported growth in CAPI response rates.

Other respondents provided insights into steps that were taken to encourage CAPI survey responses: Nearly 40% reported that they had equipped surveyors with masks and gloves or issued new guidelines to allow for a safer face-to-face interviewing environment. Clearly, such safety measures help facilitate CAPI growth during a time when most market research firms are struggling to keep up.

Respondents attributed growth of all data collection methods primarily to people having more time to respond to interviews. In addition, 32% of respondents said that with CAPI data collection, COVID-19 surveys were intriguing and thus encouraged participation, compared to 16% of respondents who cited the same reason for CATI and CAWI data collection.

### SAFETY MEASURES TAKEN TO INCREASE CAPI RESPONSE RATES



# THE NEW NORMAL

DURING THE NEW NORMAL, MOST PROFESSIONALS EXPECT THAT THEIR LEVEL OF ACTIVITY WILL CHANGE.



**“The uncertainty with face-to-face interviewing where face-to-face is the optimal methodology.”** — United Kingdom, when asked what will change in data collection.

How are market research firms weathering the pandemic and how do they keep working alongside the virus until a vaccine is found? As coronavirus continues to spread, the only thing that appears to be certain is change.

## CHANGES IN ACTIVITY

Forty percent of respondents predicted that their levels of activity would remain low in the short to medium term, but interestingly, a nearly equal percentage expected that activity would increase.

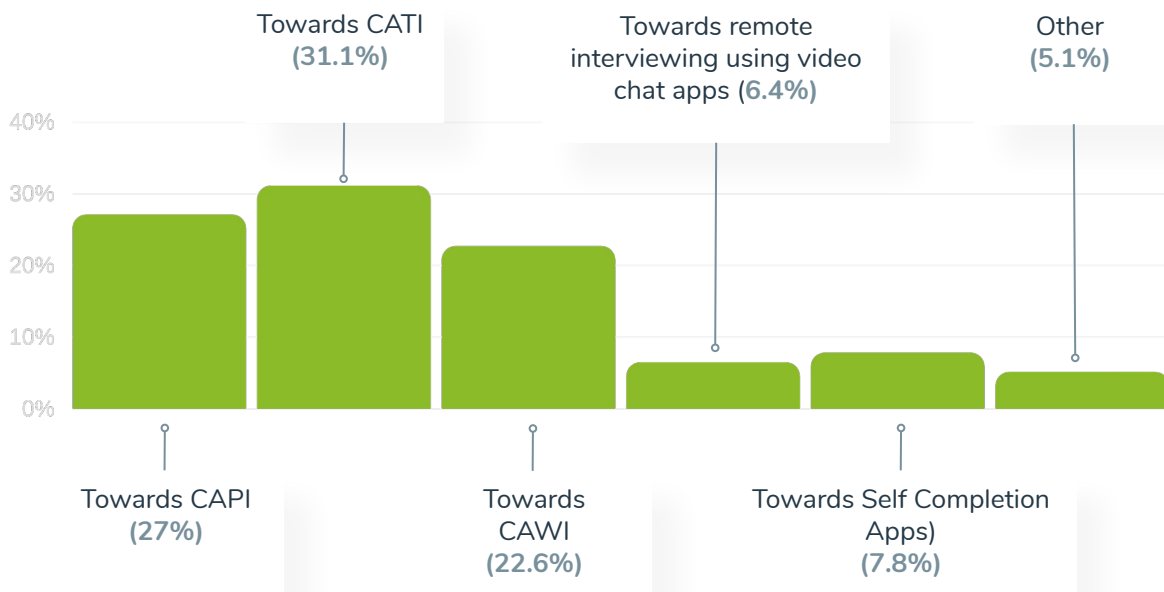
### EXPECTED CHANGES IN LEVEL OF DATA COLLECTION ACTIVITY



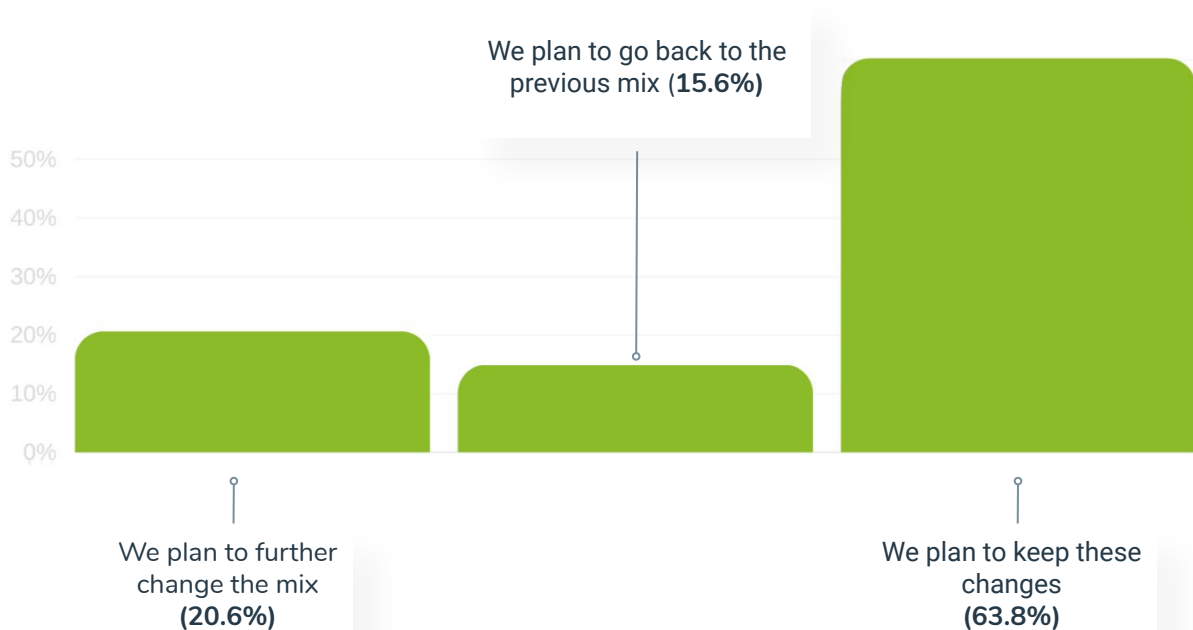
## CHANGES IN METHODS

Responses highlighted the importance of having a hybrid system that can easily switch between data collection methods: Of those that reported an expected shift in the mix of data collection methods as a result of COVID-19, about a third expected more CATI surveys as a result. Moreover, 64% of respondents expect that these changes in methods will be lasting.

### EXPECTED CHANGE IN MIX OF DATA COLLECTION METHODS



### WHETHER CHANGES TO DATA COLLECTION METHODS WILL REMAIN



# THE POST COVID-19 WORLD

MARKET RESEARCH WILL CHANGE AND IMPROVE



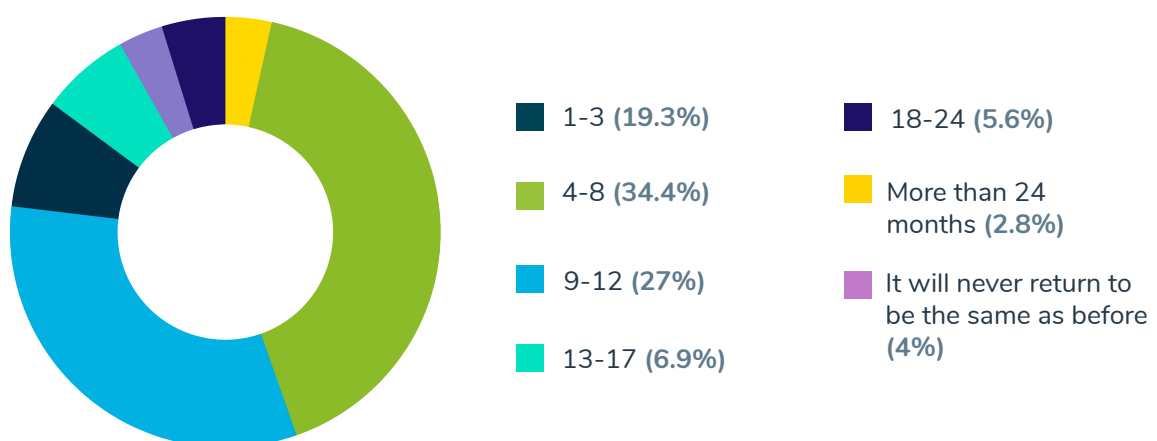
***“All projects that were put on hold will kickstart at the same time, so I believe we will have more jobs and need extra manpower.” — Malawi***

The good news is that respondents were more optimistic about market research post COVID-19 than they were for the short term.

## A RETURN TO NORMAL

Eighty percent of respondents believed that their market research activity would return to normal within a year, and 34% predicted within four to eight months. Twenty-seven percent of respondents believed it would occur within nine to twelve months, and fewer than 3% believed it would take more than 24 months.

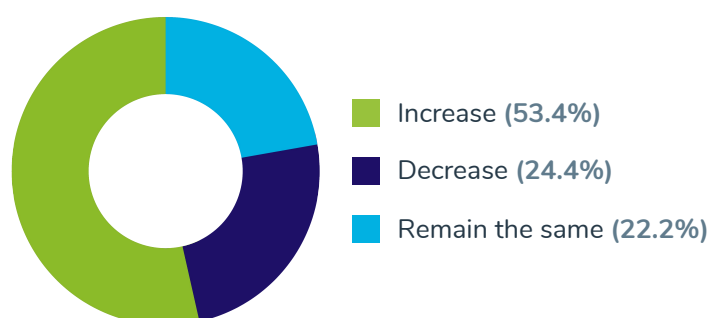
EXPECTED NUMBER OF MONTHS UNTIL ORGANIZATIONS RETURN TO NORMAL ACTIVITY



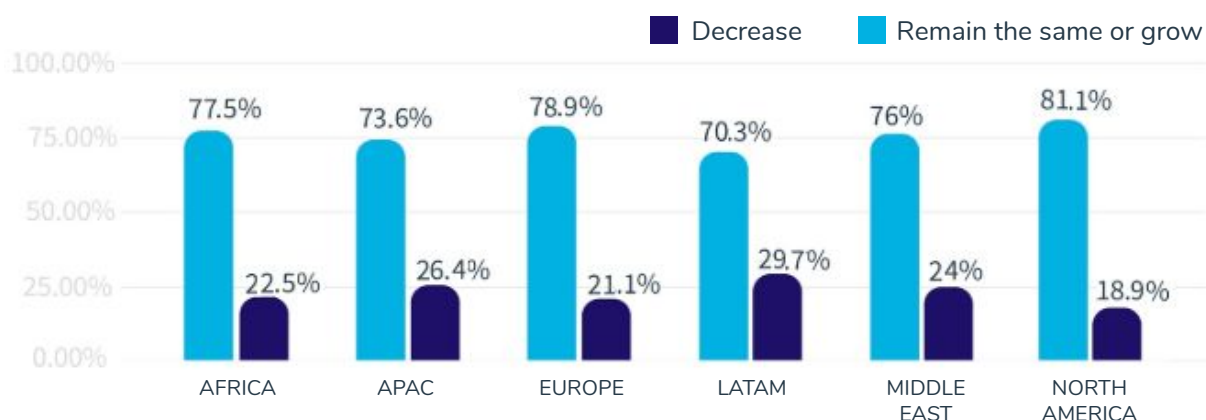
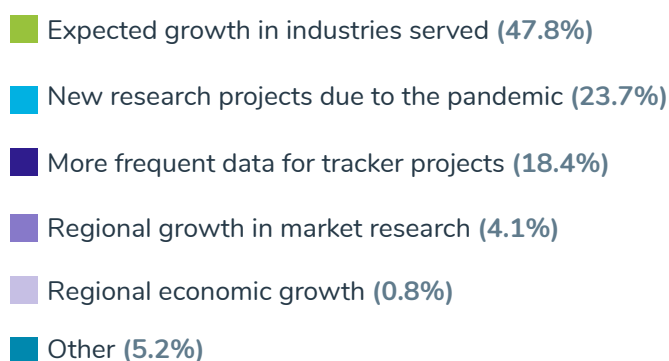
Overall, three-quarters of respondents predicted that their market research activity would either remain at the same level or increase. These numbers varied slightly by region: North America was the most optimistic with 81% expecting activity to stay the same or increase, compared to Latin America, with 70% expecting the same.

What were the reasons for this expected growth? Twenty-four percent of respondents expect their customers to ask for new research projects related to the pandemic. Meanwhile, 48% believe their business will grow along with the industries they serve, including automotive/transportation as well as financial and insurance industries.

#### EXPECTED ACTIVITY POST COVID-19



#### EXPECTED CAUSES OF ACTIVITY GROWTH





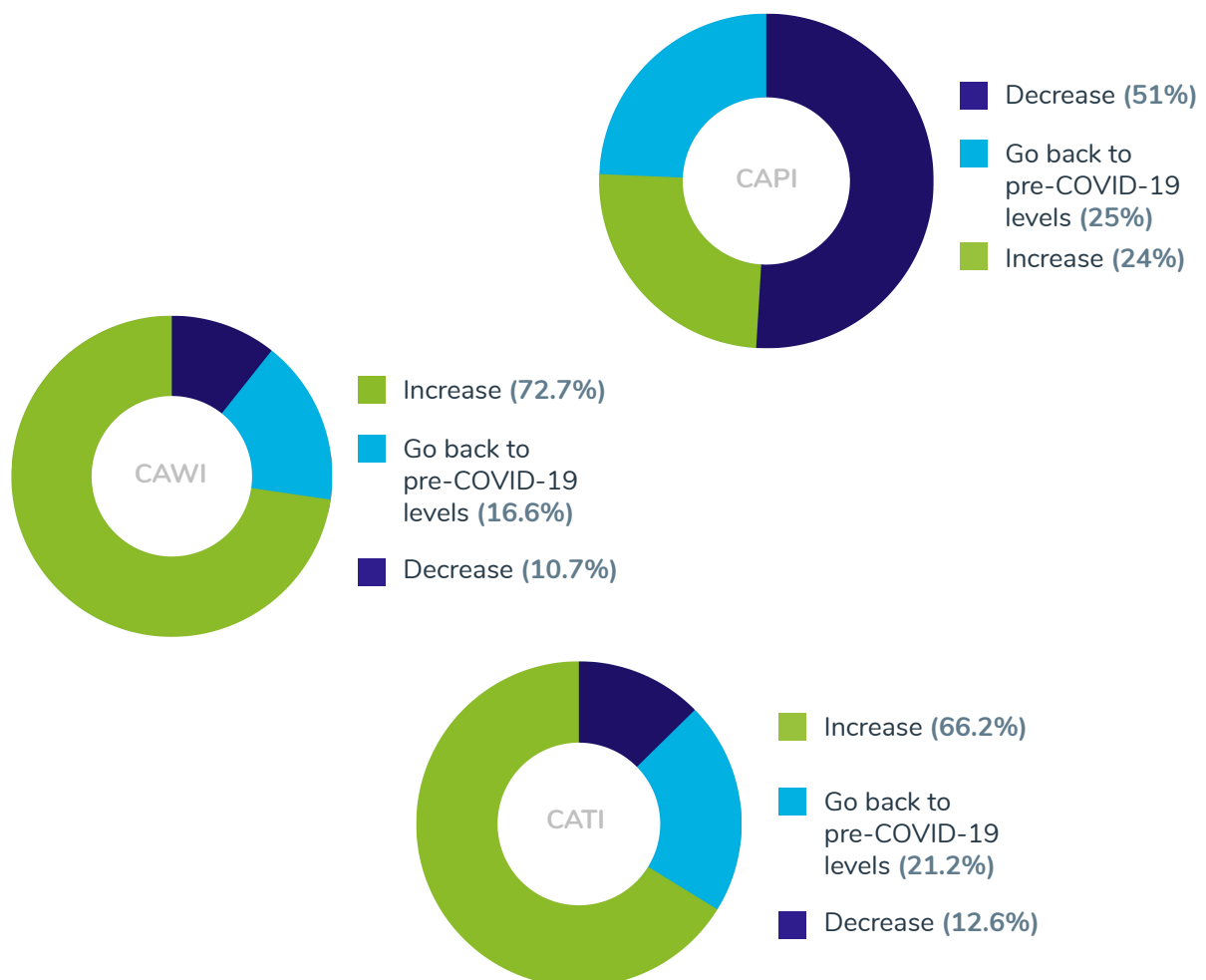
# MAKING ADJUSTMENTS



**“There will likely be a move away from face-to-face to more online environments, which has been slow to gain traction in Africa.” — South Africa**

Respondents speculated that new data collection methods would emerge following the pandemic. These included big data, WhatsApp calls, video bots, artificial intelligence, virtual data collection using Zoom and more.

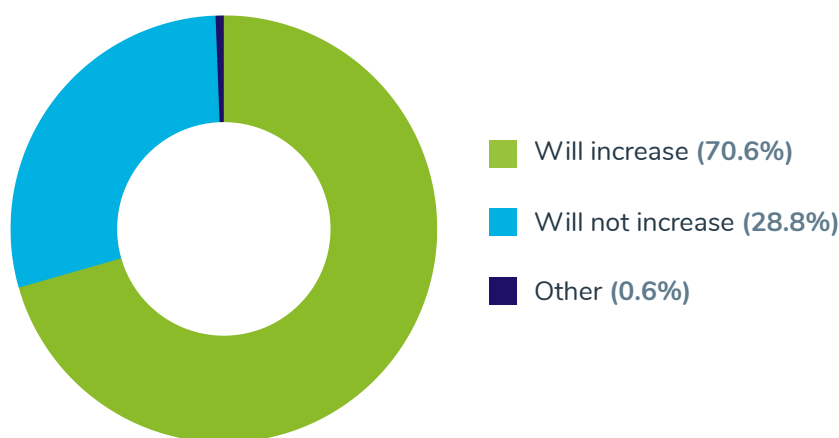
Yet perhaps most notable is the expected change that respondents predicted will occur in data collection methods. Sixty-six percent and 73% expect that CATI and CAWI methods will increase, respectively.



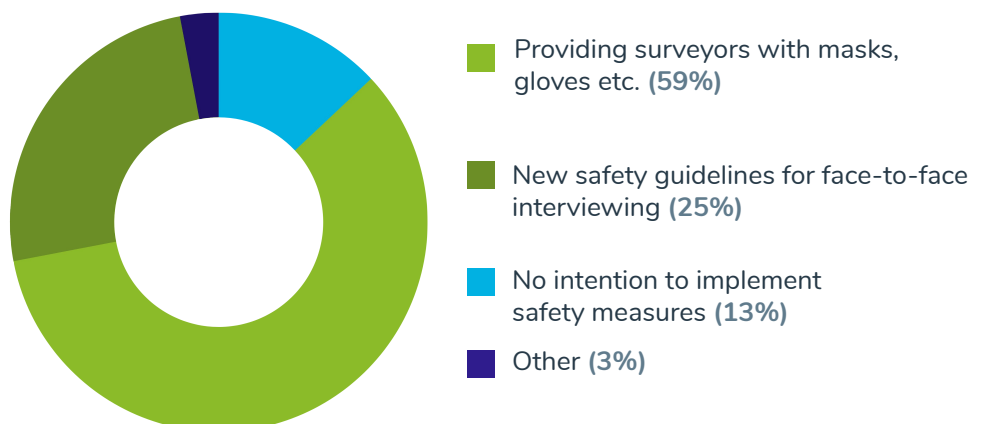
While the pandemic has unquestionably lessened face-to-face methods, about 50% of respondents expect CAPI to either return to pre-pandemic levels or even increase. In addition, 71% of respondents said that safety measures such as wearing gloves and masks in the field would help increase the use of CAPI data collection. Clearly, market researchers intend to make efforts to increase CAPI, because more than four-fifths said they would implement such measures. This intent varies by region; in Africa, more than 90% will be implementing these measures, compared to 63% in North America.

All of these changes underscore the importance of being able to quickly pivot from one data collection method to another. Unquestionably, those market research firms that combine different methods for different situations will be most successful in weathering the coronavirus and its aftermath.

#### EFFECT OF SAFETY MEASURES ON CAPI RESPONSE RATES



#### SAFETY MEASURES IMPLEMENTED



# FINAL THOUGHTS

As the whole world fights this raging pandemic, both to reduce the number of infections and casualties and prevent an extended economic recession, our role as the global research community has turned increasingly vital. Providing clear, accurate and unbiased data has become even more critical during these times when around the globe, state and business leaders must make quick and tough decisions despite constant uncertainty.

This data includes accurate information from epidemiological investigations, tracking the progress of biological research for treatments and vaccines, and understanding how less privileged communities can have better access to medical treatment, food, water and security. It also includes helping retailers, the automotive industry, financial services firms and others understand rapidly changing consumer preferences so that businesses can adjust accordingly.

Much can be learned from market research firms' reactions to COVID-19 and the effect that the pandemic has had on the industry. Although activity has dropped significantly, and firms were required to quickly adjust and sometimes change their entire business model to survive, the vast majority of market research professionals are optimistic about the future.

Many have responded to these challenges by shifting their data collection methods to rely more on remote-based methods, even though the transition often proved to be difficult. Meanwhile, many who insist on keeping their face-to-face activity are implementing safety precautions to continue and collect that valuable in-person data. In addition, some firms boosted their activity by capitalizing on demand for COVID-19 related research. In fact, this demand was seen across every industry, and may provide some insight as to how research firms can succeed during these times.

**This is the time for leaders** to step up and let their entrepreneurial and creative spirit shine so that they can find new ways to provide value to their customers during COVID-19. Harnessing the demand for understanding the new situation across governments and private sectors is the key to growth during this pandemic.

**If there's one important takeaway** from these challenging times, it's that flexibility is key. Those firms that can easily shift between data collection methods while taking advantage of new and creative research projects will undoubtedly be the most successful.

*Guy Solomon*  
CEO, Dooblo

# ABOUT Dooblo

Dooblo provides the leading survey software for the research industry by redefining the quality of the data collection process. Dooblo's customers can collect data across CAPI, CAWI and CATI modes including complete offline capabilities. Its flagship product, SurveyToGo, dramatically increases the efficiency and monitoring of the data collection process while setting new standards of data quality.

Dooblo is used by the top global market research firms in more than 110 countries worldwide. In 2019, more than 800 of Dooblo's customers collected data through more than 40 million completed interviews.



For more information, please visit  
[www.dooblo.com](http://www.dooblo.com)

