



THIS COVID-19 CRISIS PRESENTS THE MOST important time in at least a generation for business leaders to listen to the voice of the consumer. It is paradoxically a time when careful listening is most difficult. The tyranny of crisis mode, the rush of emergency operational decisions, and the distractions around remote working all make it extremely difficult to carve out time to form a thoughtful post-pandemic strategy.

A very large number of business leaders are conducting valuable, rapid-response pulse-taking studies of consumers and employees. Meanwhile, the media and research institutes are tracking public opinion regarding COVID-19 on a near-daily basis. Reflecting the nature of the crisis, results of both shift from day to day, but still yield important long-term insights.

For their part, consumers and employees are more eager than ever to help. Stressed social-distancing consumers are staying home and are much more responsive to researchers. A recent SurveyMonkey panel study found that 86 percent of employed Americans felt it was appropriate for their employer to send them surveys during the pandemic, and 27 percent felt that their employer should be surveying them more. Response rates, even for phone surveys, have jumped. People want to talk.

But, as one CNN report put it “...increased response rates and a salient topic doesn't always mean easy going for the pollsters. Media attention spikes around coverage of emerging infectious diseases and pollsters are feeling the heat of a busy news cycle.”

CONSUMER in Crisis

That chaos isn't likely to end soon and research data will remain critical. As of early April, the Pew Research Center found that 39 percent of Americans believed economic problems will last more than a year and 32 percent believed that the downturn will last between six and 12 months. Only 28 percent were expecting a quick, “V” shaped, recovery.

Overall, the pandemic has forced the research industry to adjust in three ways:

1 Handling the surge: The industry has had to creatively adapt to the wave of demand for emergency research among impacted B2C companies. This has resulted in long days and nights for many research teams, as well as shorter surveys and more conversation analytics work.

2 Faster, shorter, directional: In order to handle the crush of emergency research, the industry has flexed toward a model that looks more like political polling, with an emphasis on the speed of data collection, analysis and directional strategic guidance. This has meant a shift away from longer time horizons, and a focus on quick snapshots to guide emergency decision making, most notably on health and safety issues.

3 Shift to online focus groups: Consumer focus groups are a research power tool. Research firms around the world have had to scramble to transition from in-person to online methodologies in only a few short weeks.

In the grip of the pandemic, people are eager to talk. What should businesses be asking them? Brunswick Insight's **ROBERT MORAN** and **ADAM CARLSON** examine what to look for in the shifting climate.

Opinion research should be used to help business leaders make decisions within three time horizons:

1. Maintaining current, safe operations.
2. Reopening or ramping up operations after government approval.
3. Post-pandemic strategy in a new environment with new consumer behaviors.

Within each timeline, business leaders should be asking important questions:

SAFE OPERATIONS NOW

- How comfortable are consumers and employees with the safety measures we have established?
- How can we lead our industry on health and safety during the pandemic?
- What measures would give us a relative advantage?

RE-OPENING THE ECONOMY

- What steps must we take to build consumer confidence as the economy reopens?
- Which consumer segments are most likely to return quickly?
- Which segments will need more confidence-building measures?

POST-PANDEMIC SHIFTS

- How are consumer attitudes and behaviors changing as a result of the pandemic?
- Which attitudes and behaviors will become a permanent feature of the post-pandemic business environment?

Ernst & Young research notes four segments of the pandemic population, defined by their consumer styles. Those who:

Cut Deep	27%
Save and Stockpile	38%
Stay Calm, Carry On	26%
Hibernate and Spend	10%

How will these segments re-engage with the economy after the pandemic fades? If this segmentation holds, we may see a very deep and long recession. The largest group, those who “save and stockpile,” will be most important for researchers. Businesses will need to know exactly what confidence-building measures will bring them back into our consumer economy.

This is *the* moment for data-driven decision making, and consumer opinion is *the* most important data need as businesses re-engage after pandemic lockdowns. ♦

ROBERT MORAN is a Partner and leads Brunswick Insight, the firm's global public opinion, market research and analytics function. **ADAM CARLSON** is an Account Director with Brunswick Insight based in New York.