

# Market Research in the New World

Harnessing Changed Customer Behaviors Post-COVID



## Introduction

Looking back at the early days of the global pandemic, initial reports and business indicators featured a dreary outlook for the market research industry. In it's 2020 The Continued Evolution of the Insights, Data and Analytics Industry report, Esomar indicated its data partner Outsell predicted an overall global turnover decrease of 6% for the industry.

Predictions had the impact hitting traditional research firms even harder as the early days of uncertainty left people wondering what was going on and how they were going to connect with consumers and customers. Qualitative firms felt extreme pressure in those initial months as it became clear no one was going anywhere for a while, certainly not into a focus group facility.

As the reality of the "new normal" set in, businesses began scrambling to understand how customer and consumer behaviors and attitudes were changing, needing insight to drive

everything from adjusting marketing messaging to pivoting business strategies. Suddenly, market research became a critical part of each company's path forward.

With a little distance between those early days of the unknown and the current state of things, it's now clear that the pandemic has impacted the industry and consumer trends in more ways than imagined. To understand exactly how life post-early-pandemic has shifted, we connected with some of this year's speakers. One resounding theme was clear, things have changed. Edwin Wong, SVP of Insights and Innovation at Vox Media summarized it well:

*I once was speaking to my dear friend Elizabeth Dow, Manager of Revenue Intelligence at Vox, who talked about how we need to change our perspective when looking at consumer insights and data.*

*Instead of using a microscope, we need a telescope. A microscope can be myopic and narrow in describing consumers, what can go missing is the context needed for true insight. The*

*past 20-months teaches us context is absolutely everything. In fact, I'd argue that we might need today is a kaleidoscope. The fits and starts of re-opening, plus the changing habits coupled with the emotional toll means that understanding people and the importance of the product we create will require much nuance.*

In this report, some of our TMRE: The Market Research Event community share their perspectives on post early-Covid life: how market research has changed, the tools and methods they've introduced to their portfolio and how companies can keep up with the rapidly evolving landscape of consumer behaviors.



# The Role of Market Research



The role of market research expanded in many ways during the pandemic as a reaction to support both changes in consumer behaviors and business needs. As Justin Coates, Global Consumer Insights and Research Team Leader at Eastman noted:

Raina Rusnak, Consumer Research and Insights Lead at Peapod Digital Labs agreed:

Focusing on consumer behavior trends and deciphering what is actually a long-term behavior change versus a fleeting trend is critical for research terms right now as businesses try to balance long-and-short-term planning. As Wong pointed out:

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"Before the pandemic, the world and the markets that many of us serve were changing due to the evolution of major macrotrends such as urbanization, age and income polarization, digitization, sustainability and wellness. The economic, health, and lifestyle shocks of COVID accelerated many of these trends and resulted in them manifesting differently in consumer behavior."

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"We've become more agile and have looked to explore new methodologies to understand what the customer is telling us. We've always been a curious group. Now, we have more layers to explore – are we seeing changes because of the pandemic or is something else driving it?"

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"Research use to be more specific to product features, campaign optimization, and messaging. However, there is an even greater need to keep close to consumers to understand the large factors of how this time of uncertainty is impacting what we do, what we buy, and how we are feeling. The issues are more macro and require constant connection and leverage cultural understanding."

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This need to understand the here and now as well as future state leaves researchers in high demand. James Newswanger, Ph.D, Sr Research Manager at IBM clarified:

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"The nature of topics studied may have changed, but the role of market research remains. If anything, there are now more and more collaborators who realize we have vastly accelerated the move to a digitally transformed world and we need to understand those implications."

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The high demand for insights is straining many teams and companies. Coates highlighted the challenge well:

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"The demand for consumer and market intelligence has only intensified since the pandemic. Similar to most industries, the market research field is facing capacity constraints – too much demand and not enough supply. Many research vendors we work with globally have shared this outlook and many corporate researchers we work with have also shared the increasing demands for intelligence with limited budgets or people."

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With challenges come opportunity though. Taking this opportunity to step into the spotlight within their organization, Coates highlighted three ways researchers can make the most of the current state of things:

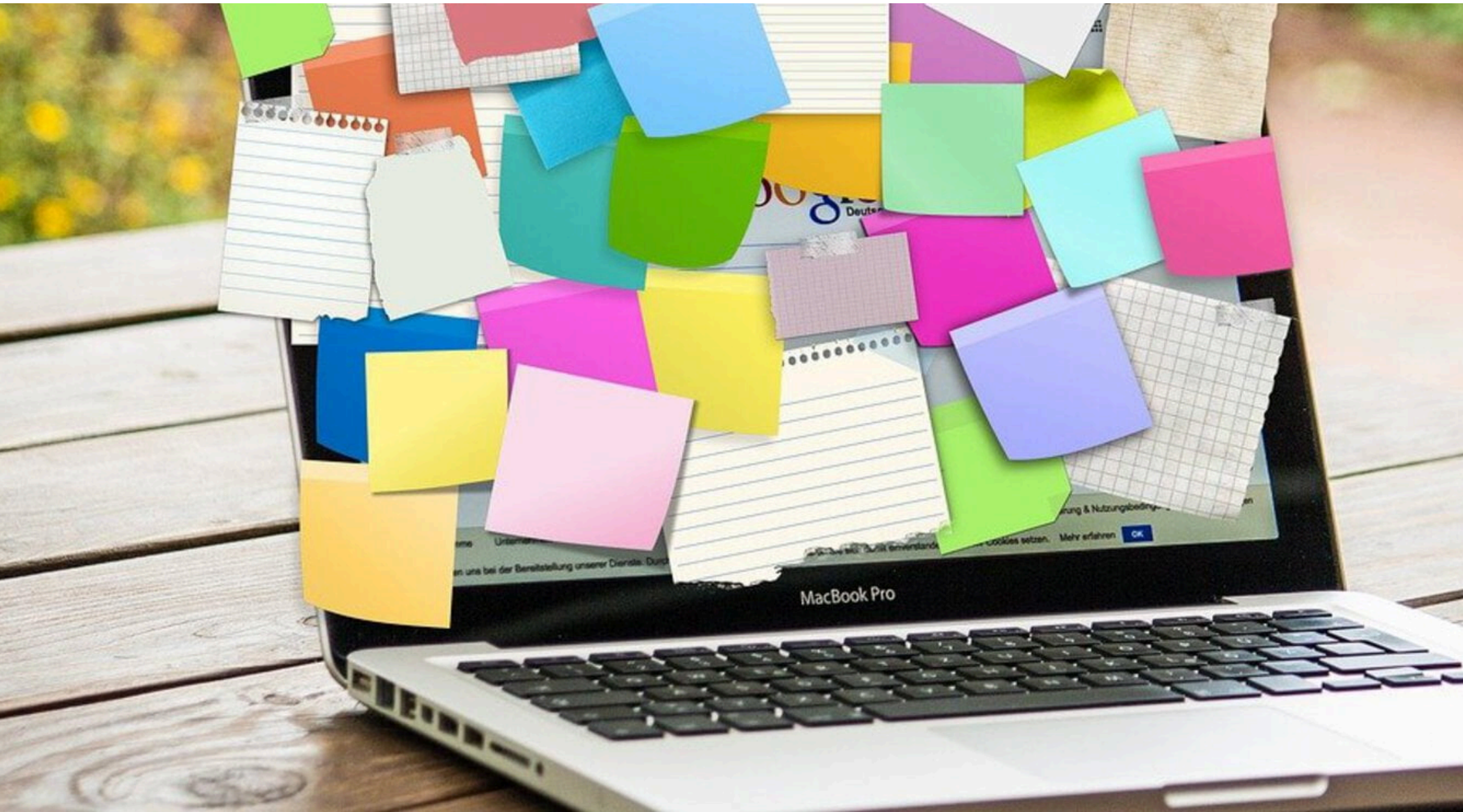
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"It is a great opportunity for researchers to determine (1) how to create efficiencies in their work, (2) how to request additional resources, and (3) what work needs to be done, what work can be stopped, and what work do you and your teams actually want to do. High demand gives research teams a lot of leverage within their organizations to make changes they have likely wanted for a long time."

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# Tools and Methods



Suddenly faced with the challenge of understanding new behaviors, needs and attitudes, the pandemic forced researchers to evaluate what information needed to be gathered and how it could be done. Some researchers relied on traditional methods and tools, at a greater volume, some tried entirely new methods and tools, but most blended a little of both. As Rusnak explained:

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"We rely heavily on online surveys for each of the companies we partner with for consumer research, but that's not new in the pandemic. Virtual platforms for qualitative research have become more important. However, a combination of both platforms is important and needed to fulfill our jobs successfully."

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Rusnak highlights on of the most notable trends coming out of the pandemic, the acceleration of research technology solutions. The number of players in the space had been expanding before Covid but suddenly, these tools offered researchers exactly what they needed: agility, speed, access and collaboration. Automation tools like quantilope or SightX allow teams to execute projects quickly, collaborate across remote teams and also execute advanced analytics projects with rapid turnaround. The agility of tools like this allowed research teams to try new methods. Rusnak's team tried an Implicit Association Test to uncover consumers' real feelings. Not in their methods library before, it worked so well the team is eager to use it again.

The real winner in the tools and methods area was, as Rusnak noted, tech-enabled qualitative research. With traditional qualitative solutions off the table, researchers had to find other ways to connect with customers and consumers. Coates added:

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"Although these tools existed before COVID, they have been perfected as everyone has gotten familiar with Zoom, Teams, cameras, etc. We have conducted a number of digital focus groups, IDI's, etc. since COVID and we are much more satisfied with the outcomes than in the past. Plus, they have the added benefit of being open to interested colleagues who want to hear directly from the consumer. The ability to bring your stakeholders along on your research journey is critical for buy-in and a successful partnership."

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Newswanger agreed, "We saw an expanded use of virtual forms of communication and collaboration for "in person" feedback. By nature, this mostly concerns qualitative feedback and our ability to perfect text and social media analysis has become even more important."



# Looking Forward





As the next phases of pandemic living unfold, it's critical to examine what can be learned from the earlier stages. Consumer changes are still unfolding, short- and long-term ones, and businesses are forced to adjust to target audiences that look different than they did a year and a half ago. Coates highlighted:

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"We have seen a significant amount of market disruption in the cosmetics, personal care, food, and fashion space before the pandemic as consumer needs evolved faster than legacy brands could react. COVID accelerated a number of emerging needs and made them universal among industries. Industries having to move quickly to adjust their strategies and offerings to keep-up."

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Web and mobile have become go-to sources for enabling these trends too, a major shift that companies needed to adjust to to find new ways to connect with consumers not going in-store. Grocery shopping saw a major shift and Rusnak's business responded:

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"Customers moved heavily to eCommerce shopping during the pandemic with many trying pick-up or delivery for the first time. From our research and consumer insights, customers prefer an omnichannel approach and each of the local brands of Ahold Delhaize USA have taken measures to address customer preferences, including a personalized online experience and adding additional pick-up points."

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Brands realized how important an omni-channel, personalized experience is for customers. Moving forward, research and insights professionals will need to work with the broader organization to make sure they have access to the most relevant first party data. As Newswanger highlighted, regular touch points to gather complete voice of the customer feedback is imperative.

The combination of first party data analytics and consumer insights will prove crucial to discovering, understanding and addressing those fads and long-term trends. Wong pointed out that researchers need to continue to develop that agility muscle that was forced early in the pandemic:

Traditional tools, trackers, and even modeling work great in times of stability. You can use historical data and lean on consistent consumer preferences. But today is different. Being nimble, flexible, and having the ability to pivot aren't just for startups anymore.

We live in a time where our lives are now in constant flux because of a pandemic, we are up against global supply chain challenges and ever-changing consumer tastes. This impact is felt internally when it comes to CRM, supply chain, and advertising/marketing spend. The research community simply needs to move with the speed of reality.

It's important to remember that, as an industry, there's an incredible opportunity to learn from each other and move the industry forward, together. Events like TMRE create the perfect, dedicated space to connect with peers, learn about new best practices and uncover new solutions to work into the mix. Connecting with and learning from peers is essential to future success navigating the unknown.

While most researchers and insights professionals feel the push to provide more insights to their organizations or customers, as noted earlier, bandwidth is tight. It can be challenging to keep up with the demand, never mind keep up with the newest methodological approaches or available tools. Coates had the best advice in this arena:

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"I recommend collaborating with your customers or industry peers. Conducting workshops or sharing sessions with insight professionals in your space or in connected industries can help get a new perspective on key issues and/or get alerted to a major change coming your way. Plus, there is the added benefit of sharing best practices and war stories with your peers that can just make you and your teams stronger researchers."

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# Thank You to Our Thought Leaders





Justin Coates, Eastman

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James Newswanger, IBM

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Raina Rusnak, Peapod

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Edwin Wong, Vox Media

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