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Preparing for the “Next Normal” - Research tips for managing face-to-face interviewing in the post COVID-19 world

8th October 2020

Moderators:

Anne Sophie Damelincourt, Founder & Owner, Blue Lemon Insight & Strategy, ESOMAR Council & Treasurer
Nabil Abouzaid, CEO, Insightek - ESOMAR Representative for Morocco

Speakers:

Massimo Cealti, Founding Partner, Altitude-C, France (former Symrise, Coca-Cola)
Nicolas Siega, Founder, Esya Logistics, France
Nabil is a passionate market researcher who spent 21 years helping various local & multinational clients, across sectors & geographies, to better understand their consumers & markets and build stronger brands, by providing relevant and actionable marketing insights.

Nabil is a currency in Market Research in Morocco. He held various roles both in the agency and the client's side before starting his own agency (Insightek) in 2018.

He is father of 3 beautiful girls and a boy. He is also a former tennis champion and a big fan of Federer, Messi and Barça. In his spare time, when not generating insights, Nabil plays snooker or Ping-Pong with his kids.
Impact of the COVID19 on Morocco

By: Nabil ABOUZAID
Impact on the MR industry

### Business impact
- MR budgets cut
- Stop of all F2F FW
- Cancellation of projects
- Projects put on hold
- Reduced scope of some projects
- Switch of some projects to online/CATI (when possible)

Less business

### Operational impact
- No interviewing of people at home/ in the street possible
- Impossibility of conducting CLT tests
- Impossibility of conducting F2F Focus Groups/In-depths

Complicated Operations

### HR impact
- Some renowned agencies cut jobs
- Some others reduced salaries
- Some small agencies are about to close doors

Less resources

And it’s just the beginning...
Country context

- FMCG is the key client for MR and housewives represent the biggest part of the targeted profiles.
- Very high illiteracy rate (32.2%), especially among housewives, lower SECs, rural...
- Rural represents 40% of the total population, with limited access to basic logistics (Roads, buildings, mobile network...)
- Lower SECs (DE) represent almost 50% of the population
- Level of equipment in technological tools (Smartphone especially: 75.7% in 2018 according to ANRT) may look very high at the national level but is not necessarily so with all the targets mentioned above

Industry context

- The poll culture is not yet well established in Moroccan society. Responding to an individual online survey, and without the help of an interviewer, can be very complicated given the difficulty of understanding questions and answering them appropriately.
- The tendency to complacency and the over-claim/under-claim of certain answers, a phenomenon already widespread in our culture and suffered by most research firms, is likely to increase further as long as the respondent is left alone without the presence of an interlocutor able to challenge his/her answers.
- Data collection is mostly done in F2F, unlike countries that are more technologically mature and where data collection is done almost systematically online.
Some of the solutions put in place...

**CATI (when possible)**
Provided the CATI center takes the necessary health measures and has the infrastructure for remote CATI.

**CAWI (when possible)**
Provided the questionnaire can be auto-administered and that the target group is literate enough to understand questions.

**Online FGDs**
Provided respondents are familiar/trained to some of the visio-conferencing tools and that connexion is stable.

**Online ethnography**
Provided respondents are familiar/trained to some of the visio-conferencing tools and that they are open to film inside their home.

**Placement-recall instead of CLT**
Provided the product to be tested can be placed at home and that stocking conditions are optimal.

**Online communities**
Provided respondents are familiar/trained to some of the visio-conferencing tools and that connexion is stable.
thank you
Massimo Cealti

- Massimo has 30 years of experience in consumer research both with client and agency, he currently is a Partner at ALTITUDE-C, a specialized consultancy in foresight, data analytics, and sensory where he helps clients grow their revenues by analyzing consumers’ preferences with a passion for product and innovation.
- He previously worked for the Coca-Cola Company, Symrise, Nestlé, McDonald’s.
- He has 3 kids and loves cooking and mountains.
TIPS for FACE TO FACE INTERVIEWING UNDER SANITARY UNCERTAINTY

Massimo Cealti
ALTITUDE C - Founding Partner
October 2020
We’re talking about consumers only in part for once.

We’d rather be talking about the work of clientside researchers and agencies.
COVID-19 Pandemic
„Since lockdown it feels like a rollercoaster“

We need a SHORT TERM PROGRAM and a LONG TERM STRATEGY
everyone agrees....

**MANTRA #1**

Virtual or remote testing can’t fully replace face-to-face for the time being. It can act as «second best».

**MANTRA #2**

Avoid contagion by Minimizing human to human contact.

(physical distancing measures are in place, and in most countries will remain till early 2021...)
WHAT CAN WE LEARN FROM THE CURRENT COVID-19 PANDEMIC?
THIS DOCUMENT IS THE RESULT OF DISCUSSION WITH CONSUMER RESEARCH PRACTITIONERS AND SENSORY SCIENTISTS AROUND THE WORLD (F, B, NL, US, I)

HOW TO ADAPT INTERVIEWING AND DATA COLLECTION IN THE SHORT TERM

HOW TO ADAPT TO SANITARY UNCERTAINTY IN THE LONG TERM AND IDEAS ON WHAT TO DO SHOULD “SANITARY UNCERTAINTY” BECOME THE “NEW NORMAL”
WHAT HAVE WE LEARNED FROM THE COVID-19 PANDEMIC?

- The impact of the pandemic on consumer research has been wide (geographically) and often deep (workload, revenue and human capital).
- Physical distancing is in place in more than 120 countries.
- Contamination risks come from “human to human” contact.
- Shifting everything online is certainly an option but cannot be performed for selected research methodologies or it is specifically discouraged for some particular targets.
NOT EVERYTHING CAN SWITCH TO «FULL DIGITAL»

Product Testing

Interviewing selected LSMs
WHAT HAVE WE LEARNED FROM THE COVID-19 PANDEMIC?

- Product testing facilities represent closed spaces where contagion cannot be excluded.

- Response from China, where research has resumed work sooner, show that respondents are reluctant to join projects as they see an unnecessary risk in these activities.

- We can continue working effectively in the “new” conditions.
FACE TO FACE INTERVIEWING IN THE "COVID ERA"

(should SANITARY UNCERTAINTY become the "New Normal")
Current covid-19 pandemic may be the first “wave” in a series of outbreaks, specialists foresee a series of “spikes” and recently more than a few places were forced into a 2nd lockdown.

There may be other pandemics in the future. We should not be caught unprepared in the future and we need to adapt and change our practices.

CLTs, LAB tests, HUTs as well as every research methodology (including Qualitative) which takes advantage of face-to-face interviewing needs to be revised.
Central Location Tests (CLTs) will be hit hardest by unfavorable conditions.

Distancing and health practices must be followed (see appendix for a list).

But CLTs are much more than a bunch of consumers trying a product in a room: if respondents are not comfortable both physically and psychologically, they will unconsciously adopt defense mechanisms which will affect their preferences and jeopardize the replicability of their assessments.

Psychological anxiety about social distancing practices and related obligations (masks, gloves, hand sanitizing gel etc.), and the unconscious general fear of contagion will certainly play a role (which will be very hard to measure and sterilize) in Central Location Tests.
ADAPTING FACE TO FACE DATA COLLECTION in the SHORT TERM

DURING RECRUITMENT
- **screen** respondents for current symptoms and contacts with virus positive people (Trace)

WHEN PLANNING FIELDWORK
- physical distancing is a must
- consider **running tests in the open**
- prefer **one-to-one interviewing** or privilege respondent **self-completion**

New Technological solutions allow to create portable connections virtually anywhere, even where there’s NO internet connectivity or wi-fi.
ON THE DAY OF FIELDWORK

- respondents to sign a waiver of responsibility or/and an informed consent form
- Physical Distancing is a must as much as respecting every safety measure requested in your country (these vary greatly): if possible scan respondents temperature upon arrival, ask them to wear a mask and wash their hands or use hand sanitizing gel
- Minimize interactions by having automatic recording of presence and ID (using tablets or PCs) and avoid grouping them in the same room.
- If your product requires preparation the technician must use gloves, mask and goggles
- Use recyclable disposable materials for product serving

AFTER INTERVIEWING IS COMPLETE

- Disinfect furniture and survey materials after each use:
  using isopropanol or isopropylalcohol, or hydrogen peroxide (odourless) or peracetic acid.

How do we measure the effects of physical distancing on how consumer respond: replicate an existing test run prior to the pandemic and compare results in the 2 different contexts
**HUTs are more relevant** since they can adapt to the change in context and being managed remotely

- **Product consumption** is performed in “true-to-life” conditions in the real world
- **Psychological anxiety** is sterilized because respondents will be their real selves at home
- **Product usage** is not easily controlled: but actual circumstances can be recorded.

- Product preparation and usage can be reported (or even filmed)
HUTs are becoming **HYBRID**:  

**RECRUITMENT**  
- respondents can be selected using “remote” methods: telephone, street intercept, e-mail, social media, fidelity cards, associations, “snowball” 

**PRODUCT DELIVERY**  
- PRODUCT TEST LOGISTICS for HUTs is becoming a key success factor and innovative ideas flourish like  
  - “Drive-in”  
  - “Community collecti points”  
- Logistic companies are boosting their capabilities for transporting « delicate » goods as super-fresh or dangerous items and offer cost competitive alternatives. 

**RECALL**  
- Reach respondents after product trial using “remote” methods (telephone, e-mail... even surface mail can do the job!)
Thank you! stay safe! Thank you!
Nicolas Siega

- Born in Switzerland, with both Italian and Swiss nationality, has lived and worked in 6 countries, amongst them Ivory Coast and South Africa.
- His core experiences and expertise are both business development and marketing,
- Has worked for several multinational companies as VP Sales then Regional VP, Global Account then VP for Africa, Middle East and Turkey.
- Nicolas founded ESYA LOGISTIQUE, which is focusing on supporting small, medium and niche businesses for all their logistic needs: from custom made packing, shipping of delicate items (art) or dangerous goods, etc.
PRODUCT LOGISTICS FOR THE “COVID ERA” PRODUCT TESTING

Nicolas Siega – ESYA LOGISTICS
ADAPTING and INNOVATING

During the lockdown we have developed ad-hoc solutions for the “new” situations with selected agencies because reaching people at home effectively, rapidly and economically is the new paradigm.

These solutions included some African countries.

What has changed?

“Everything and nothing has changed” *

During the lockdown we have developed ad-hoc solutions for the “new” situations with selected agencies because reaching people at home effectively, rapidly and economically is the new paradigm.

These solutions included some African countries.

We will share creative tips on how to deliver effectively and economically directly to consumers in most African countries by respecting the new requirements.

* DHL
UNIVERSAL CHALLENGES

1. Territory Coverage Challenges

Availability of logistic services varies **rapidly over time** on a country by country basis.

Airfreight capacity **restrictions, limited transport capacity**, waiting time at customs, local hubs closing down, **physical distancing**, no collection points available, no signature required, etc.

**Suspension of “Money Back” Guarantee!**
Parcels will be returned in case of not carefully prepared shipping instructions

2. Price Challenges

The obligation to “go digital” for interviewing has expanded the need for shipping but often **not the budget to do so**...

• Innovative solutions must be cost effective: e.g. shipping to “collect centers” both existing or created ad-hoc: use an interviewer to centrally collect and locally re-dispatch the product samples…
Consumer samples often need to be representative of a whole population and in many African countries there are striking differences between urban and semi-rural or rural areas.

It is not infrequent that even in mayor towns outskirts, in semi-rural and areas streets have no name and houses no number (*), frequently there are “popular unofficial names”.

So how do you deliver to an “imprecise” address like (close to Ngong Forest Road Kuwinda, Kenya)?

(*) the World Bank Land Administration Project is helping put roads on the map e.g. in Ghana

Logistics for the “covid era” product testing

ESYA LOGISTICS
4. Delivery Safety Challenges

Delivery safety concerns both the **CONTENT** (dangerous goods like alcoholic fragrances or aerosol deodorants) and the **WAY the delivery** is performed (you do not want items **loss or theft**).

- Dangerous products have special shipping requirements from IATA.
UNIVERSAL CHALLENGES more so in Africa?

5. Packing challenge

Some agencies went from sending 3 parcels to a central location test to sending 400 parcels throughout the country, for exactly the same test.

- There’s a need to temporarily have more staff to prepare the shipping

OR

- choose an external partner to get everything done and optimized, including product assortments.
KEY DECISION POINTS FOR PRODUCT SAMPLES SHIPPING

Market dependent
Variability in Africa is so high it is impossible to generalize

Transporter Choice
Even the global players “skip” some countries from the map

Type of delivery
Personal? Existing Collection point? Temporary collection point?

Dangerous Goods
Check if your product is classified as dangerous and plan accordingly

Packing
Do you need more staff to prepare your shipping or do you choose an external partner to get everything done?

The last mile issue
Adapting with agility to the local reality is required for successful deliveries

Logistics for the “covid era” product testing
Missed a Circle?

Catch up with the community insights and read up on the crowd-sourced findings or listen to a past recording freely available to our members: [https://www.esomar.org/community/community-circles](https://www.esomar.org/community/community-circles)
Thank you so much for your participation!

Questions: info@esomar.org and member.relations@esomar.org

Resources: www.esomar.org and ana.esomar.org