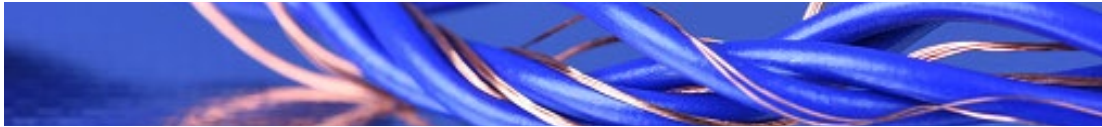


ESOMAR Statement:

The role of Data, Research and Insights community in supporting global crisis and post-crisis management of Covid19 measures.



ESOMAR



Key recommendations to facilitate access and dissemination of our expertise

Research has always been the cornerstone of informed decisions; why not lean on that expertise now and ensure evidence-based decision making and accelerate the termination of the crisis and the recovery post-crisis?

For these reasons, ESOMAR is calling upon business leaders who commission research, national government leaders, international bodies, and the business community to take these following steps:

- 1. Maintain the current levels of funding and reallocate research spend to help improve our knowledge and evidence-base on Covid-19 related measures;**
- 2. Enact government funding programmes to specifically support collaboration on Covid-19 thematic research for the general interest;**
- 3. Issue immediately calls for tender to conduct comprehensive and wide-ranging social research by researchers that abide to the principles of accepted codes of conduct governing market, opinion, and social research;**
- 4. Support our measures to collate and disseminate research expertise for the general public interest;**
- 5. Establish multi-disciplinary research expert groups composed of academics, private experts and government representatives to provide up-to-date research expertise on the impact of the crisis and to support communication efforts both during and after the crisis has passed;**
- 6. Work with these expert groups to evaluate and use the insights to inform government strategies moving forward.**

The research community stands ready to act in support of the general public interest.

A unique context, a watershed moment

Our world is currently facing a watershed moment. Measures that have been put in place to limit the spread of COVID-19 virus have been transformative and have unsettled life as we know it. Wide-spread confinements, travel bans, curfews, social distancing, forced closures of businesses and resultant job losses are all extremely disruptive in and of themselves, but the combined social ramifications of all these measures will have an impact that takes all of us into uncharted territory. The future of our global village now seems more uncertain and out of our immediate control than ever before.

Many businesses are battling to survive and are looking to cut discretionary spending as part of those survival techniques; governments are – by necessity – focussing

on the immediate crisis management of Covid19, as are the media, who are dedicating their full news cycles to this single topic.

Consumers, citizens, humans throughout the world are having to adapt to a new way of life. In this environment, the risk is high that we develop tunnel vision and act solely based on our fears, rather than on solid evidence. Fear is a contagious virus of itself, and resultant behaviour patterns risk including misunderstandings, one -sided sentiments, and mistaken expectations. We must avoid this very human reaction and ensure that we both apply and communicate the right knowledge and competence to chart the way forward, using evidence and data to help us make the right decisions.



The data, research and insights sector is equipped for this moment

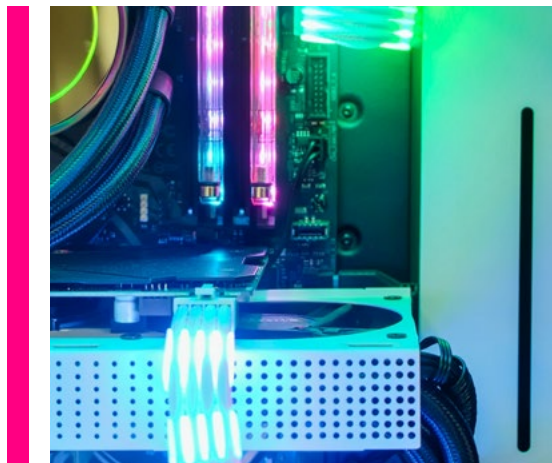
For the last two decades, we have all been part of an increasing digitised and globalised society. Our ability to work from home, to remain virtually connected through digital means, to collect data passively from devices like smartphones and wearables, and to pool essential data about movements are now helping all of us to (monitor?) stem the practical impact of the required and essential government measures to slow the spread of this virus.

The data, research and insights sector has been a part of this digitisation and globalisation trend; it has been impacted by it, it has been enriched by it and has long advocated our responsibilities to it.

Now more than ever, the wealth of data which is produced by our increasingly digitized societies means that we can overcome the practical restrictions and

continue to effectively research people for their opinions and their behaviours. Through the responsible use of technology and the application of our analytical skills and capacities, we are still able to provide a real understanding of people's lives in the current confinement stage of the crisis in many countries, and what will have to be a managed de-confinement stage in the coming weeks and months.

Our sector is well equipped and well prepared to deal with the required, temporary shift to a nearly all-online model and is confident in its ability to produce the required knowledge and guidance that decision-makers should and must rely on with the hopes of resuming research using the widest spectrum of methodologies possible in the future.



Essential research should be encouraged to continue

Now more than ever, we need social, opinion and market research and data analytics to help us understand and chart the impact that this disruption is having on our societies, and equally, to help decision-makers and society's leaders to understand how to determine the best way forward.

In this extraordinary time, we underline more than ever that decision-makers should take decisions based on solid, unbiased and fact-based evidence. The data, research, and insights sector can be a critical source of such evidence and guidance; essential research and analyses on the behaviour and attitudes of both citizens and consumers should be maintained, encouraged and intensively used by governments, businesses and charities alike, particularly now.

It is a mission that our sector takes seriously, it is our *raison d'être*. The fundamental basis of the data and insights profession is about

listening and understanding people's views, and interpreting this information to guide brands, organisations or governments when making decisions. From the everyday products we use, the films we watch in the cinema, the food we eat, to governmental policies, humanitarian causes – research must continue to play its key role in guiding and supporting effective and timely policy decisions in the journey from concept to citizens and end-users.

Our sector's role is about analysing and interpreting (the right) data to build information and knowledge that can be used to predict future events, actions or behaviours. This is where the real skill of our profession lies. Insights enable people all over the world to understand and interpret the increasingly complex world we live in and insights will enable us to overcome the grave impacts this crisis will wreak upon our societies.





We are taking our responsibilities

Our members - and the associations to which they belong - are working to develop and share knowledge that is already emerging. They are helping to track and understand shifting behaviours and sentiments displayed by the public so as to inform and improve all of the public relations efforts that are currently designed to contain the spread of the virus, maintain trust and confidence in our economies, and reduce public disquiet. Many research actors are making their expertise available to their local communities and countries in order to ensure officials and business leaders appreciate these changing tides.

In the coming weeks and months, our members and the associations representing them will be increasing our capacity to share these insights; sharing results which are being made publicly available by our member organisations and helping to contribute to an improved global knowledge and awareness about this unique global crisis and its effects - in exactly the same way that our members' research has helped societies to anticipate and understand shifts in public opinion, businesses to improve, and non-profit organisations to improve their effectiveness, for the past 70 years.



Investing in research is more critical than ever

The research community is already collaborating with business and governments to evaluate the trends and impact of the crisis and to help decision-makers plan for the future. However, as economies start to feel the pinch, discretionary spending will be the first to be cut off and this will no doubt include investment in research that is often undervalued.

Many of our community members are now offering their services to assist, making public the results of privately commissioned research to inform societies in this hour of need, and making expertise available to support our governments and businesses to manage crisis communication effectively.. We may not be at the frontlines of efforts to tackle the health crisis, but as we have always been, we are trusted intermediaries that have played a critical role in increasing the return on investment and the chance of success of measures and services alike.

As a community, we therefore urge those decision makers who commission US\$ 80billion worth of research from the data, research and insights community annually, to maintain and indeed reinforce their investment programmes in order to maintain the essential research capacity that is needed to inform and guide effective decision-taking, especially in uncertain times.

Such funding is necessary and critical to maintain the research and analytics ecosystem and enable it to play its essential role in advising all business and economic sectors, government bodies, and charities on the actions and measures that will be vital to maintain public confidence and trust in our societies. Commercial and non-commercial research actors alike depend on this ecosystem to be able to estimate, analyse, and render insights that appropriately reflect the communities researched.



Lean on our community's expertise

As a community, the research profession stands ready to support decision-makers; our members have been working tirelessly to move ongoing research projects that have been using call-centres, focus groups, and face-to-face interviews into the online world – thereby limiting physical proximity, and ensuring the profession can contribute to the known benefits of social distancing in these times. We will continue to support those who trust in us to provide them with the knowledge to move from a tunnel vision of understanding to a broader and more comprehensive one.

Research, be it conventional survey research or the more digital methods of social media listening and/or data synthesis (and irrespective of whether it is commercial or non-commercial), has the capacity to separate what is important to citizens from what is important to politicians, policymakers, NGOs and special interest groups. We can provide early signals of the emergence of new concerns. Our expertise in testing communications can help uncover which parts of messaging are clearly understood and which are not. In each instance, they provide detail and nuance that no other reporting tool can match.

It will now be more critical than ever before to conduct extensive research into the will, and aspirations of our fellow human beings. A true and comprehensive understanding of the aspirations of all constituent parts of society would now be invaluable to organisations across the four corners of the world, as it would provide evidence-based guidance to all of those who have the responsibility of a) building a convincing response to the unparalleled crisis and b) providing a clear vision of what the post-crisis world will look like. It will also uncover how to better communicate with the constituency(ies) including messaging about complex and long-term issues that can be designed to meet the different segments.

Already today, many of our members, be they large globally renowned agencies or local boutique agencies, are working tirelessly to increase insight and understanding of how the world around is being changed by the Covid19 outbreak. This research is, and will be, invaluable to facilitate and enable government and business leaders to evaluate and take effective decisions that strengthen public trust and confidence, overcome the crisis as quickly as possible, and reboot our economies:



Understanding public expectations for certain government measures

Ipsos

Ipsos is a global research agency which is tracking the impact of Covid-19 on public sentiment, both globally as well as in individual countries throughout the world. Amongst the many research studies that it is currently carrying out on the topic is a piece of research which is comparing public expectations for certain government measures across 12 different countries. In this particular study, Ipsos examines at citizen views on whether the flow of persons should be contained through border closures.

The survey examines rapidly changing public sentiment on a whole range of topics that are currently being discussed by governments, and which may help to raise understanding of the readiness of populations to accept certain measures or not. A majority of people across 12 nations think the borders of their country should be closed until the coronavirus outbreak is contained, according to the latest Ipsos survey.

Their survey of 12,000 people across 12 major countries conducted from March 12 to 15, underlined that countries in the Asia-Pacific region are most supportive of border closures – led by India (79%) and Vietnam (78%) – perhaps not too surprising, given where the disease was first encountered. More than 3 in 4 people in the world's other hot spot, Italy (76%), are also in agreement of this drastic measure followed by those in China (73%), and Russia (70%).

<https://www.ipsos.com/en/majority-people-want-borders-closed-fear-about-covid-19-escalates>

Tracking the changing global public opinion across 25 countries

YouGov

YouGov is an international research data and analytics group with a proprietary panel of over 8 million people globally and with operations around the globe. YouGov's data is regularly referenced by the press worldwide and plays a key role in today's climate as we begin to better understand the public's reactions and opinions to the COVID-19 public health crisis.

With daily polls, ESOMAR Member YouGov is supplying a continuous stream of accurate data and insight into what the world thinks so that companies, governments and institutions can better serve the people and communities that sustain them.

The YouGov tracker is helping to uncover key insights about differences in attitudes across the globe, for example highlighting that those living in Asia and the Middle East are far more fearful of catching the disease – generally between 53% and 83% – than people in Europe and North America – generally between 27% and 45%.

<https://yougov.co.uk/topics/health/articles-reports/2020/03/21/international-covid-19-tracker-how-public-opinion->

Raising cross-industry understanding of the impact of Covid19 in China

Kantar

Kantar is one of the world's most renowned research agencies and has published in-depth research detailing the cross-industry impact that Covid19 has wrought on the Chinese economy.

Kantar's team have been paying close attention to the market during the epidemic. Using their in-depth market knowledge, cross-category expertise and eyes on the ground, Kantar has published reports that analyse both the challenges and opportunities that various industries are confronted with.

Kantar's report also explores potential trends of the industries in the special market environment that exists in that country, with the intention to help enterprises cope with the uncertainties, seek stability amid rapid change, and unlock opportunities against this crisis.

<https://consulting.kantar.com/growth-hub/a-cross-industry-view-on-impact-of-covid/>



Tracking the impact on Africans and African business in seven key African countries

KASI Insights

KASI is one of Africa's leading providers of data, measures, and insights to understand the average African's behaviour. Every month, Kasi listens to Africans and turns survey-based data into actionable insights. As part of its efforts to track the impact on Africans and African businesses, the agency launched a monthly COVID-19 survey, with over 3,000 interviews conducted across the seven key African countries, namely, South Africa, Nigeria, Ghana, Tanzania, Kenya, Ivory Coast, and Cameroon.

The COVID-19 Pulse reports uncover how the coronavirus disease is impacting consumers in Africa, what changes they are making to their lives, and how it's impacting brands and businesses. Despite the low prevalence of cases in Africa, the survey is already finding that 85% of the people surveyed are concerned about coronavirus with 60% of the respondents citing that they are very concerned about the coronavirus. Incidentally, respondents in countries where individuals have been tested positive for the coronavirus are also the most concerned.

<https://www.kasiinsight.com/covid19>

Understanding public reaction to the outbreak in Belgium and its impact on consumption

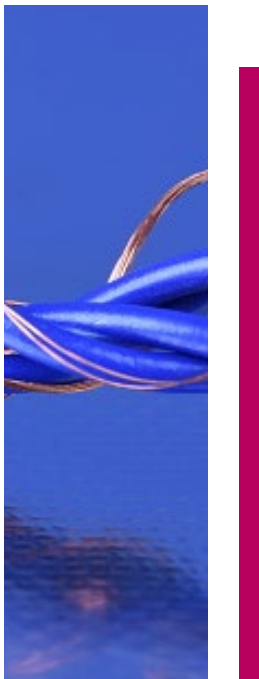
GfK

GfK, one of the world's leading research agencies has published research that provides insight into the public's reaction on the Covid19 pandemic, focussing on both large and small countries alike.

GfK's ongoing research helps to demonstrate and identify the moment societal concerns spiked leading to panic buying and other behaviours that have a sensitive impact on the purchasing behaviours. This information in turn helps inform business decision takers about the possible impact on logistic chains and demand for their products.

The research, for example, highlighted and tracked how government measures impact both the behaviours within households as well as purchasing behaviour: Concern seemed to be contained among Belgians until the 10th of March, with almost 40% of the population stating to be "not worried" and "not worried at all" about the virus. The situation, however, changed in the days following the growing number of infected individuals and the new measures announced by the government. While 14% of the population became extremely worried during the week 13/3 – 16/3, the share of 'not worried at all' Belgians significantly dropped; since then, the general concern has increased and can be expected to increase further in the coming weeks following the new confinement measures announced by the Belgian government starting the 18th of March.

<https://www.gfk.com/en-be/insights/news/how-did-belgians-react-to-the-covid-19-outbreak/>



Capturing US readiness to take disruptive Covid19 measures


Pew Research Center

Pew Research Center, a leading public opinion polling agency, is also helping to keep track of the impact that Covid-19 is having on the American population and the public perception of how the Trump Administration is handling the crisis. Research conducted in a new national survey, conducted March 19-24 among 11,537 U.S. adults using the Center's American Trends Panel, finds that despite the partisan differences in views on several aspects of the outbreak, there also are important areas of agreement. It tracks, for example, the shift in readiness by the American population to adopt social distancing and lockdown measures similar to other countries in the world: Notably, majorities in both parties say it is necessary to impose strict limitations on commerce, travel and entertainment in order to address the outbreak.

The survey also shows and captures nuances in findings, noting for example that pinions about how President Donald Trump is handling the crisis are less positive, and more divided by partisanship. Nearly half of adults (48%) say Trump is doing an excellent or good job responding to the outbreak; an overwhelming majority of Republicans (83%) express positive views, compared with just 18% of Democrats. However, Trump's overall job rating is higher than it has been since the first few months of his presidency. Currently, 45% approve of the way he is handling his job as president, while 52% disapprove. In January, 40% approved of Trump's job performance.

<https://www.people-press.org/2020/03/26/worries-about-coronavirus-surge-as-most-americans-expect-a-recession-or-worse/>





Supporting Latin American healthcare systems with intelligence and insights FINE Research

FINE Research is a leading independent data collection company in Latin America. It runs several panels which address healthcare professionals in Latin America and as a result is well placed to support the health care profession in these countries as they prepare for the Covid-19 pandemic progress through the region.

FINE Research has been using its evidence-based medicine information tool, mailing capabilities and survey community platform, to provide updated information on COVID-19 to the Healthcare community. It has offered free of charge research for any initiative coming from public ministries of these countries in order to ensure that health-care professionals are taking decisions to prepare for and mitigate the impact of the Covid-19 on Latin American healthcare care

FINE Research runs and funds an ongoing COVID-19 Monitor, with a first wave run on nearly 1000 physicians in 4 Latin American countries (Brazil, Mexico, Colombia and Argentina) specifically on the status of the healthcare system itself to determine what should be the action plan for decision-makers.

The research identified that a focus is needed on improving hospital infrastructure and citizen awareness of the symptoms and prevention strategies, establishes evidence of a probable underreporting of diagnoses of Covid-19 showing the need of an urgent expansion of the testing capability, and a higher physician support of policies in countries looking to implement strict lockdown measures to contain the spread of the virus.

<https://www.fine-research.com/blog/news/covid-19-making-research-community-available/>

More example of research findings published and shared for the public interest

Eureka of Research: A unique collation of global research findings shared for the public interest

The sector remains committed to supporting our societies and economies to understand the impact of Covid-19 on populations and to help decision-makers to better prepare for all eventualities. More information on available research is being made available on our collation of Research Eureka on the Research Choices platform at:

<https://researchchoices.org/covid19/>

ESOMAR Covid-19 Community Kit:

A resource centre for the sector on Covid-19

A compilation of our sector's recommendations and guidance can be found on the ESOMAR website where we have created a Covid-19 resource centre capturing both international and national statements and recommendations addressed to the data, research, and insights community at: www.esomar.org/covid-19

ESOMAR

Founded in 1948, ESOMAR gathers nearly 5000 professionals and over 300 companies worldwide providing or commissioning research, including public and academic bodies. For further information on ESOMAR and its activities, contact Kim Smouter, Head of Public Affairs and Professional Standards.

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