



The Impact of the Pandemic

A Stakeholders' Needs Assessment Survey

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Scope of the Study



We asked MORES stakeholders (members and MORES event attendees) on their current business views, MORES program expectations and specific program content.



The survey was done online. Survey links were both sent out via email (around 200) and posted on social media account of MORES.



A total of 77 stakeholders participated in the survey.



The survey was conducted from April 30 to May 9, 2020.



Key Findings



Profile of Respondents

Snapshot of the Respondents

Participants are mainly from research agencies holding middle management positions.
Participants also split on status of MORES membership.



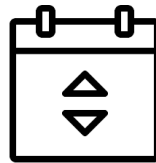
ROLE IN THE COMPANY

Owner CEO Senior Executives	22%
Director Manager Supervisor	73%
Research Executive Junior	5%

INDUSTRY CLASSIFICATION

Research Agency - Full Service	51%
Research Agency - Field / DP Supplier	17%
Research Consultants	6%
Research User - Product	10%
Research User - Services	7%
Advertising Agency/ Media	4%
Academe/Non-Stock	3%

Clients
(n=15)



AGE GROUP

Below 30 years old	12%
30 to 40 years old	34%
41 to 50 years old	27%
Above 50 years old	27%



GENDER

Male	29%
Female	71%

MORES MEMBERSHIP

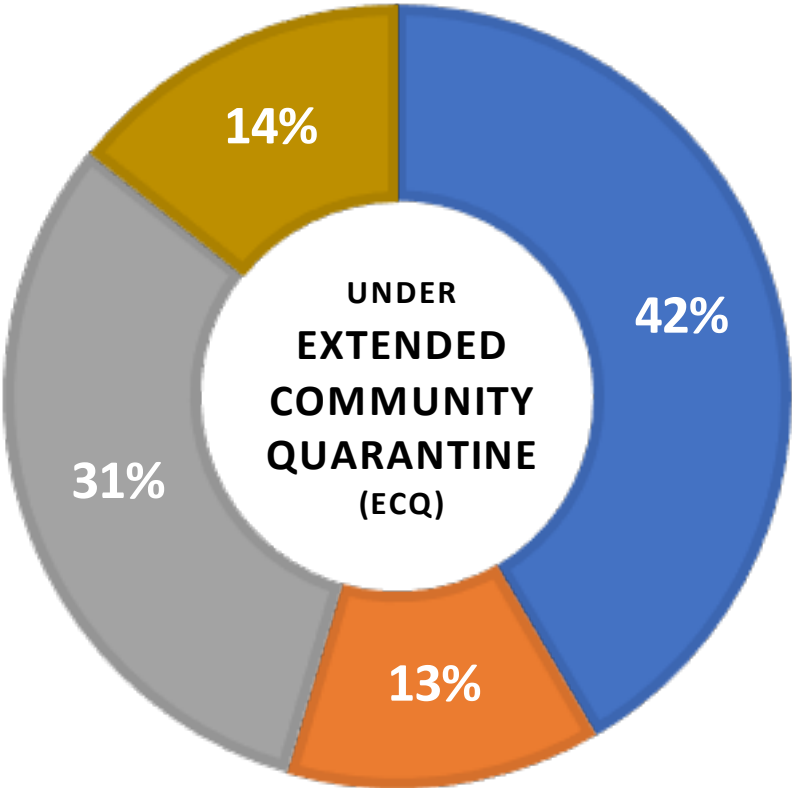
Current member (2020)	40%	Member for about 7 years
Previous member (pending membership renewal for 2020)	20%	80% plan to renew, 50% as corporate member
Non member	40%	40% plan to become member



Base: Total Interviews (n=77)

Current Status of Business

Almost all of the participants are operating businesses (even under ECQ) – in full or partial operation capacity. The few who closed down are high among research agencies, non-members.



	TOTAL	INDUSTRY		MORES MEMBERSHIP	
		Research Agency	Research User - Client	Member	Non member
Fully operational but working remotely (work from home)	42%	42%	33%	40%	43%
Fully operational (Hybrid - on site and work from home)	13%	4%	47%	15%	10%
Partially operational	31%	37%	13%	34%	27%
Not operating	14%	18%	7%	11%	20%



Business views

Views on Business Environment

Business outlook is divided – about 50% positive, and 50% negative.
Higher positive outlook among research users.



Total Better = 47%

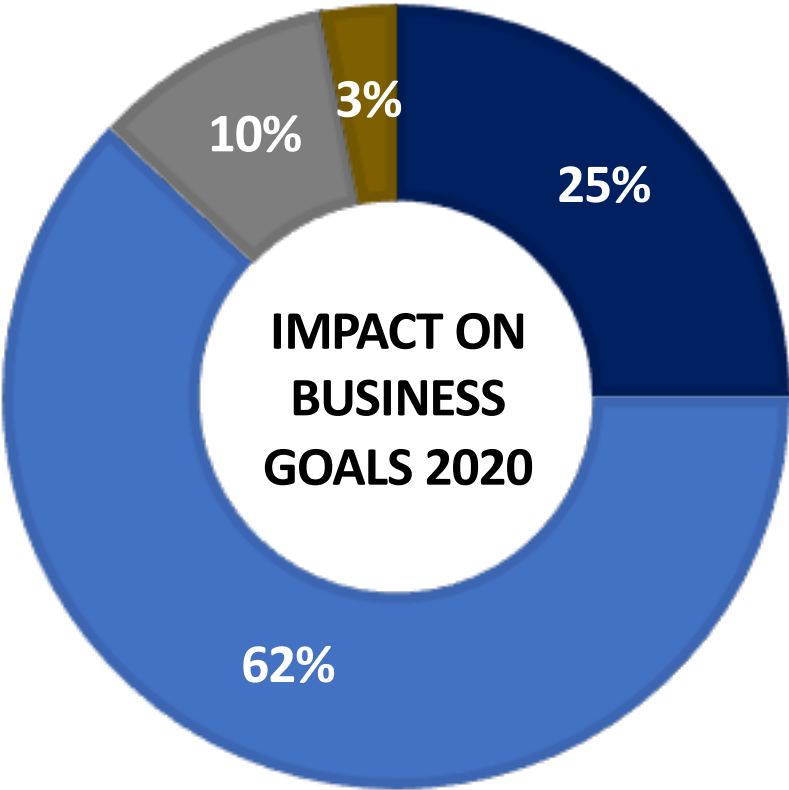
No Change = 8%

Total Worse = 45%

TYPE OF INDUSTRY		TYPE OF MORES MEMBERSHIP	
Research Agency	Research User - Client	Member	Non member
40%	60%	47%	47%
5%	13%	2%	17%
54%	27%	51%	37%

Impact on 2020 Business Goals

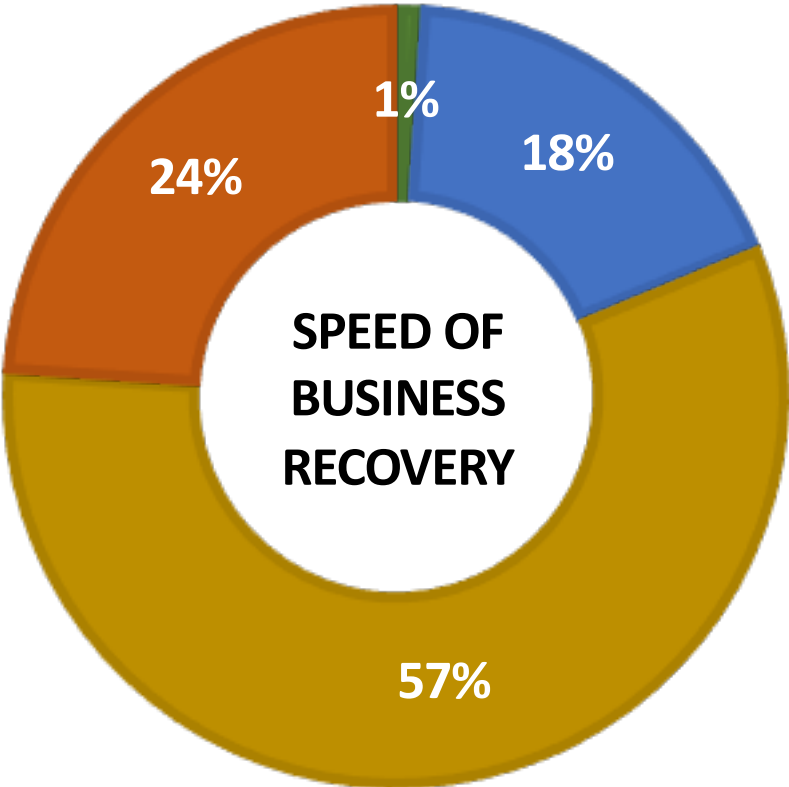
The pandemic registered a huge impact on the business plans for 2020 – both for doers and users.



	TOTAL	INDUSTRY		MORES MEMBERSHIP	
		Research Agency	Research User - Client	Member	Non member
Severe effect	25%	28%	20%	21%	30%
Significant effect	62%	60%	67%	66%	57%
Moderate effect	10%	9%	13%	11%	10%
Minor effect	3%	4%	0%	2%	3%

Speed of Business Recovery

Business recovery is expected to take more than one semester – even longer for users vs. doers.



	TOTAL	INDUSTRY		MORES MEMBERSHIP	
		Research Agency	Research User - Client	Member	Non member
Within 3 months	1%	2%	0%	0%	3%
More than 3 to 6 months	17%	18%	13%	17%	17%
More than 6 to 12 months	55%	61%	47%	55%	63%
More than 12 months	23%	19%	40%	28%	17%
	78%	80%	87%	83%	80%



Expectations from MORES

Expected Change in Research

The move to digital research is a critical research expectation in this current times.
Doers are likely to be impacted due to the decline of research budget and a recourse to free research.



62%

Move all F2F interviews to online



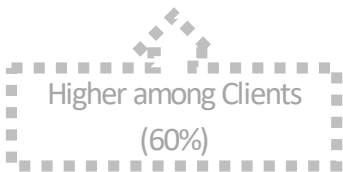
60%

Less research due to reduced budget



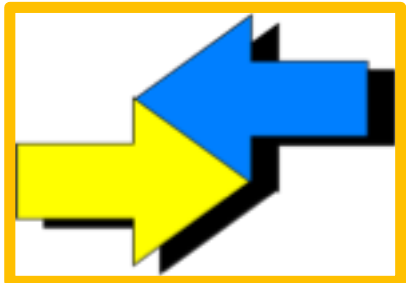
26%

Resort to free or secondary research



6%

More research requirements vs. last year



5%

Same research requirements as last year

Topics/Contents Desired From MORES

Needs are focused on the 'how(s)' of online method , work practices in the new normal, and business strategy.

Top Priorities

Best practices on digital / online research methods
Market research in the new normal - Client POV

Online sampling or sampling in the digital space

Market Research Technologies / Platforms

Best practices in online qualitative research

Implementing new work practices in the new normal

Field operations protocols during a health crisis

Using MORES 1SEC Questionnaire

Merits and demerits of online panels / community

Segmenting Online or digital users in times of crisis

Business strategy / survival tips in challenging times

Online survey programming/designing

Learning sessions on consumer coping behaviour

Data science/big data analytics

Learning sessions to engage consumers

Qualitative online skills

Tracking public opinions and consumer attitudes

Research on logistics and fulfilment (delivery) trends

Advertising/Communications During Crisis

Online needs

73%

51%

45% Higher among Members (57%)

35%

31%

31%

26% Higher among MR Agencies (35%)

25% Higher among Members (34%)

25%

22%

22% Higher among Clients (47%)

19%

Higher among Clients (40%)

19%

Higher among Non-Members (27%)

14%

14%

10%

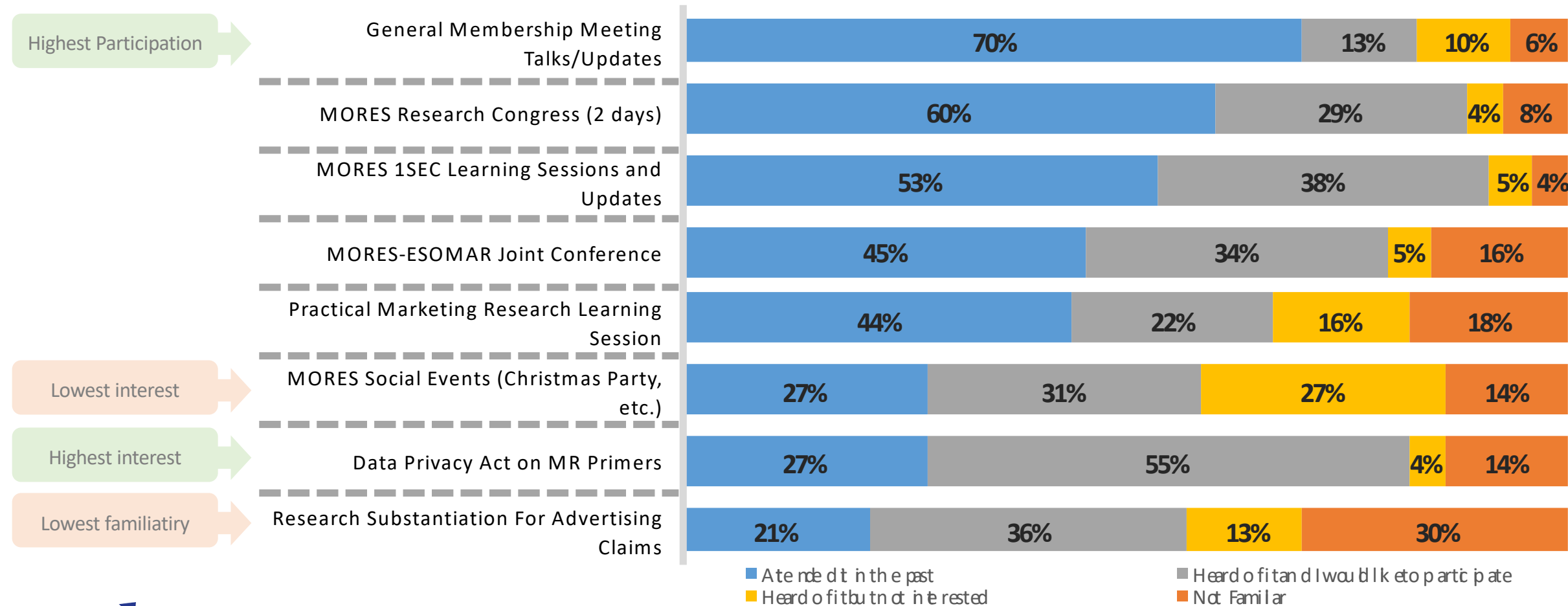
9%

8%

8%

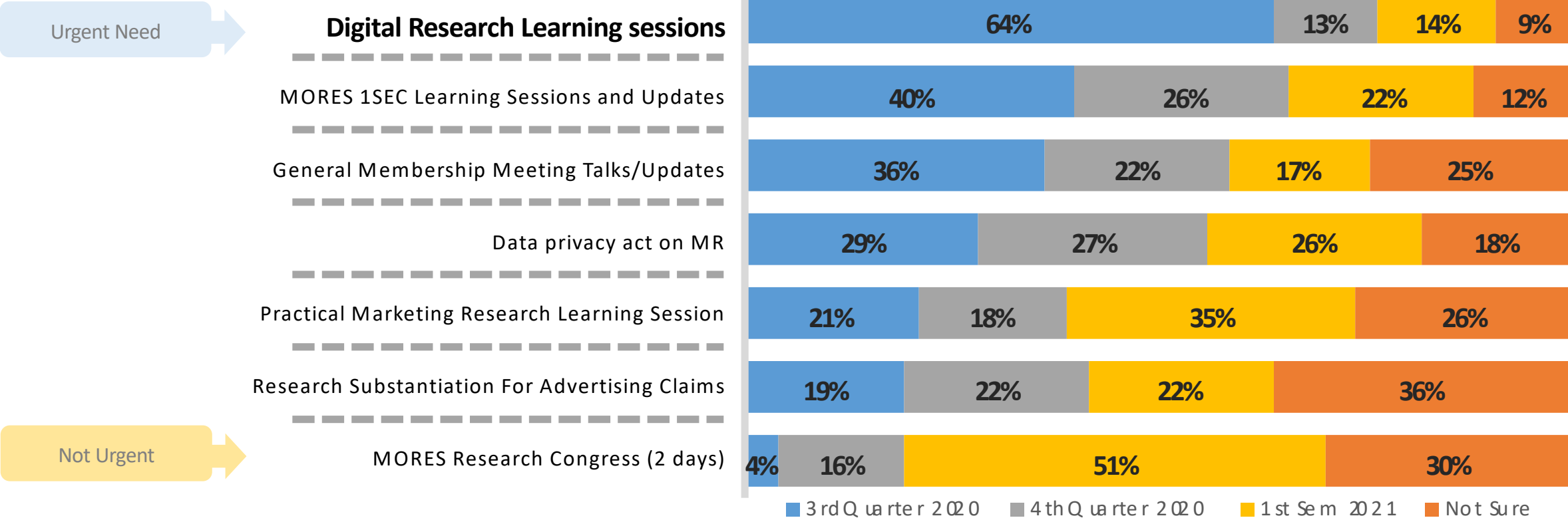
Participation in MORES Events/Programs

MORES events/programs are generally accepted with high participation and interest. Though selected events/programs show room for improvement in relevance and promotion.



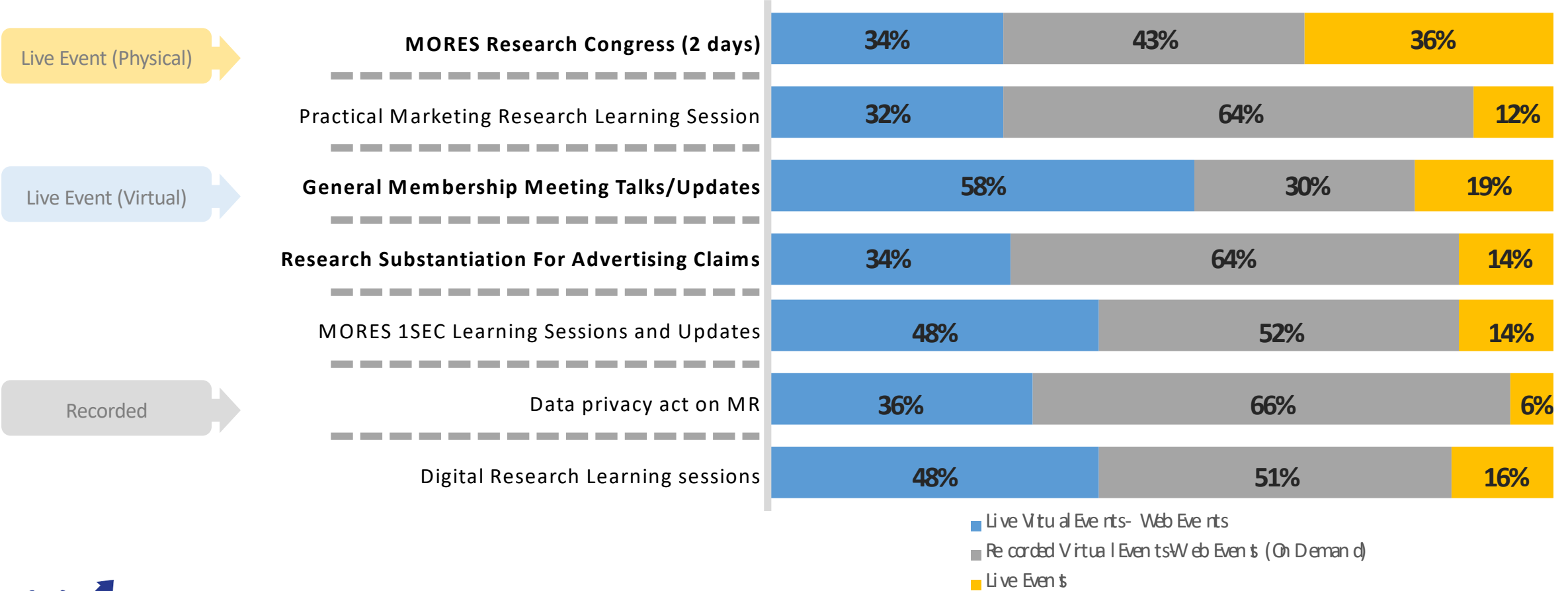
Ideal MORES Implementation Period

Given the move to online, need for sessions on digital research is of urgent need. While the activity requiring physical interaction is deprioritized for next year.



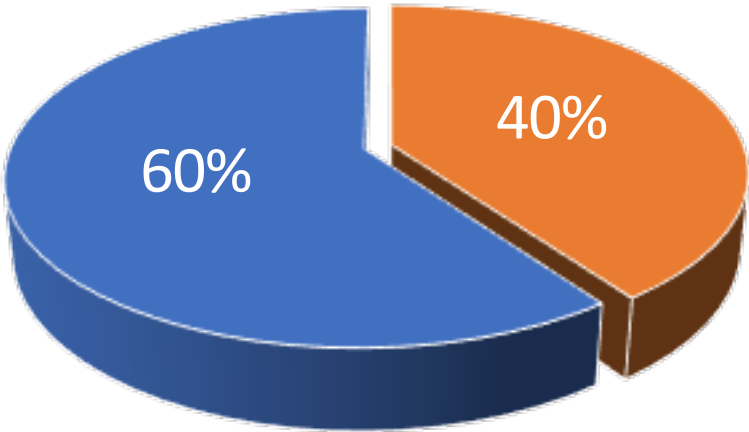
Mode of Program/Events Delivery

In this new normal, most MORES activities are expected to be virtual events, especially for talks/ updates. Higher preference for pre-recorded sessions except for GMM Talks (prefers to be live via online).



Openness to MORES In-House Training

Still registered a high interest for in-house training.



	TOTAL	INDUSTRY		MORES MEMBERSHIP	
		Research Agency	Research User - Client	Member	Non member
Yes (on In-House Training)	60%	58%	60%	60%	60%
No (on In-House Training)	40%	42%	40%	40%	40%



Summary

In a nutshell....



Almost all of the businesses are still operation – though many at reduced capacity.



Shift to online method is a critical priority for different businesses. Hence, MORES should put high priority on activities that support this shift.



Also important is a relook at work practices and updates on recovery strategies.



End of Report