

THE NEW PLAYBOOK

Understanding Best Practices for Research, Strategy and Innovation during the COVID-19 Pandemic



FINDING A TRUE PATH FORWARD THROUGH UNCERTAINTY

At Egg, we are guided by the principle that life is messy but not random and it is our job to help clients find the true path forward for their brands.

We have never experienced anything like the COVID-19 pandemic before. Comparing it to 9/11, previous stock market crashes, or even World Wars, doesn't reflect the real uncertainty of this global situation. We can't assess the true impact yet, we don't know how long it will last, and we certainly don't yet know what life will look like on the other side.

We do know that with all this uncertainty there is no single way forward or a one-size-fits-all response for our clients. Flexibility will be crucial as what may seem right today may need to be revisited tomorrow, next week, a month from now or even next year. More than ever before, our clients and the people they serve are seeking security, stability, connection and hope— and, let's be honest, something to smile about.

So, during this unprecedented time when the norms of research might feel upended, we are updating our playbook. Our Egg team has been thinking about, and helping our clients consider, how research can foster a deep understanding of people during this global health crisis. While it requires a few obvious adaptations like conducting work virtually, there are more far-reaching implications.

Uniquely today, research can provide space for people to speak openly about their hopes and fears, as well as be a welcomed distraction from work, family or roommates – even a place to air their deepest concerns about global health and economic impacts. For our clients, research can serve as a unique moment in time for brands to stay connected with the people that they continually support and serve. For our strategists, internalizing the true impact and emotional toll this pandemic is having on the hardest-hit consumers can be emotionally taxing. All of this reinforces the importance of leading with empathy when pursuing a consumer-first strategy.

In the following piece we'll highlight three key implications that have influenced our perspective on:

- **The type of projects worth pursuing now (and which to avoid, for now)**
- **How to design for safe experiences and successful outcomes in the current context**
- **How best to serve up insights and create confidence in developing strategies**

For more information on Egg and our approach to consulting in a COVID-19 world, please visit us at www.eggstrategy.com or drop me a note matthew@eggstrategy.com. We're here to help and would love to keep the collaborative conversations going!

01/ Now is not the time to stand still

Knowing which types of initiatives are relevant today can help you actively lean into the current environment versus put everything “on pause” and miss valuable opportunities to learn and connect with consumers.

Based on conversations and recent commissions, the following represent primary marketing research initiatives that we feel are relevant right now:

- Qualitative exploration and illumination research that assesses attitudes, emotions, needs, behaviors and usage, keeping proper framing in mind as to observed (or hypothesized) influence of COVID-19 on that category and/or consumer
- Quantitative segmentations and target illuminations that help us understand deeply ingrained beliefs, values and attitudes
- In-home, occasion-based research that can provide a unique window into people’s intimate WFH and shelter in place realities
- Journeys / path-to-purchase / channel behaviors to profile the current/shifting landscape, as well as to begin to establish a foundation for understanding the “new normal”
- Brand equity studies and brand health trackers to understand consumer perceptions of and interactions with brands now compared to pre- and post-Coronavirus
- Perceptual mapping studies to understand how brands are perceived relative to one another and where white space opportunities lie
- Choice modeling to shed light on trade-offs consumers make across product benefits and attributes
- Given the current circumstances, pertinent topics across industries and categories include:
 - / Understanding substitutions and alternatives in situations and categories where consumers are doing LESS of something (like commuting, vacations, etc.)
 - / Understanding the “stickiness” of brands, products and behaviors in situations and categories where consumers are doing MORE of something (like cooking) or doing things differently (like DIY exercise classes, at-home hair coloring, etc.), where we’d like to sustain this engagement in the future
 - / Understanding the impact of new or shifting behaviors and experiences for specific audiences (like buying in bulk or ordering essentials online for consumer groups where this has not previously been the routine)



Keep calm
and protect
YOUR friends

😊

- Alternatively, there are some research initiatives that **may not be helpful to pursue** at this point in time:
 - / Validation / confirmatory research and/or normative research (e.g., product validation, BASES concept testing) that is reliant on comparison to 'norms'
 - / Predictive research (e.g., identifying high-value consumers, forecasting accurate future growth predictions) in categories that are highly impacted by COVID-19-19
 - / Pricing research (e.g., new product pricing, pricing value and elasticity)
 - / For fast-moving consumer goods categories, recall-based research in situations where the last consideration, purchase or consumption occasion is greater than 30 days in the past
 - / "Foundational" studies where the output provides the basis for longer-term strategy and/or the results cannot be easily revisited or "refreshed" in the next 12-18 months
- Based on current client engagements, we also see value in pursuing brand strategy initiatives (like positioning, re-positioning, architecture, etc.) at this time. Here's why:
 - / These are typically projects that have been "sitting on the back burner" for a while - just waiting for the right time/bandwidth from team members.
 - / In many cases, the majority of inputs used are mined from the stockpile of foundational work that's already sitting within your vault, as well as extracted from historical brand narratives and "ambition sessions" with key stakeholders.
 - / Further, brands are just as important, if not more important, in today's world. When consumers are anxious and looking for comfort, confused by their options, frustrated by their time to choose or worried about making a bad choice, it's the brands that are clear about what they're offering and create emotional engagement by tapping into feeling that win.
- Innovation work including new concept ideation, consumer co-creation, and iteration is also still relevant and possible through a myriad of virtual tools. However, we're recommending stronger framing around inputs and pipeline goals. For example:
 - / Shorter-term innovation initiatives or "pipeline infusions" are possible, especially if the occasion context and frequency of use for your product or service remains stable. If the frequency of relevant occasions is now being amplified by shelter in place requirements, or new occasions or contexts are now popping up, this can be leveraged as fuel to create new ideas for products/services/experiences with the goal of sustaining the higher levels of use and engagement being experienced today even after the pandemic fades away.
 - / Medium or longer-term pipeline initiatives (e.g. for launch in 2023 and beyond) are possible by rigorously anchoring in future contexts. By using forward-leaning trends and inspiring teams to envision big, bold, ambitious futures with the unique problems and opportunities that will be present in that future-state, you can create outside the undue influence of constraints or instabilities in markets today.
 - / Additionally, looked at differently, what we're seeing play out today relative to COVID-19 could actually be helpful in the short and long-term IF leveraged in a strategic-creative way. By envisioning very different future states based on shifts taking place today and hypotheses around which dynamics will sustain, increase or fade away, you can create additional "angles of attack" or "lenses" for more future-proofing and expanding your idea generation toolkit.

02/

Bring empathy at every step

Study designs can't ignore the disruption to daily life. We must take an empathetic approach to how questions are asked and what we ask of respondents. While we need to create a safe space to address the changes and challenges we all face today, we also can't let this overshadow meeting learning plan objectives.

Thus, we're incorporating the following into our study designs:

- We are spending more time gathering context from respondents before any interaction to understand all the factors that are impacting people today (e.g., critical HH demographics, employment status, financial stability, purchasing pattern behaviors within category – past vs. present, changes in normal daily routines, etc.).
- We are screening for inclusivity to ensure representation across a spectrum of experiences (from those immediately economically impacted to those adjusting to working from home).
- We are carefully considering how to ask about topics that may be highly volatile or emotional for consumers (e.g., job security, discretionary spending, a negative customer service experience related recently cancelled travel, etc.). And we're working to recruit participants who are capable of expressing themselves and then moving on to the next discussion topic versus getting stuck or "emotionally spiraling," which increases the chance of "losing an interview."
- We are changing how we craft discussion flows and design specific question types (e.g., sensitive warm up/ice breaker question, avoiding predicting the future).
- We are designing thought-provoking and fun experiences, with creative exercises and question types that actively engage participants in the discussion (e.g. making use of time at home to do additional homework through journaling, or activities like baking or cocktail making), all with an appropriate set up that doesn't diminish the seriousness of what's going on around us.
- We are working to examine out-of-home behavior in compliance with new, accepted social distancing behaviors and need (e.g., virtual "shop-alongs" are focused on before and after reflections, not in-store behavior that could create traffic-jams or expose participants to additional risks).
- We are pulling standard operating procedures from our Health business more overtly into our other areas of operation, including:
 - / Screening for current health concerns, especially possible COVID-19 infection
 - / Monitoring for self-reporting of health concerns, as well as being on the lookout for Depression symptoms and warning signs that would indicate the need to depart from our research and ensure our respondents are able to get the help they need while maintaining confidentiality requirements

- Especially for longitudinal studies, we are preparing our clients, strategists and participants for the potential of a friend, co-worker, family member, loved one...or even themselves...to be directly impacted by the pandemic.
 - / We're letting consumers know it's okay if they pause or step away from participation if they need to re-focus on caring for themselves or anyone else.
 - / We're having proactive conversations with clients about sample planning and replenishment, as well as the need to be flexible with it comes to sample management, participation reminders and honoraria distribution.



03/

Respond to today but plan for tomorrow

When analyzing and reporting on insights, deliverables and strategic recommendations must acknowledge the context of today while also nodding to what the journey ahead may bring for the category, brand and /or consumer.

Various macro and micro influencers today will likely continue to shape behaviors and mindsets tomorrow. As we partner with our clients, here are just a few examples of influential factors we're not just keeping top of mind, but in many cases incorporating directly into our work:

- As people prepared for and are now navigating the reality of sheltering in place, we've witnessed a wide range of behaviors and emotions. How long will we be confined? When will our daily routines stabilize? When will there be some semblance of normalcy, even if this "new normal" looks and feels different from the world before COVID-19? And when we all finally emerge (whatever this looks like), which attitudes, beliefs and behaviors will sustain, and which will fade away along with the easing of restrictions? Every step of the way will provide unique implications and opportunities for clients to consider around how people purchase, use, and continue to engage with various brands and products.
- Depending on each individual's demographic, geographic and economic reality, as well as the impact of the COVID-19 on their health or the health of a dependent, the specific brands, products and services they turn to may shift over time.
 - / Channel behaviors and supplies are not entirely stable so we need to recognize that, right now, access and inventory may be having undue influence on decision-making.
 - / At the same time, consumers are adaptable or being forced to adapt (e.g., shift to online shopping and socializing). As consumers learn new skills, or have new experiences, we need to keep track of reported vs. actual changes in the way they interact with those same categories over time.
 - / And as people willingly choose or are forced to try new products or brands, we need to stratify which new buying patterns may be fleeting versus could represent substantial, sustaining change.
- Across categories we're seeing companies step up to support employees and customers, as well as populations diagnosed with, at increased risk for or on the front lines of fighting COVID-19. Thus, we need to recognize and track instances where individuals discover or now report loyal purchases from brands that they believe align with their values based on the way the company/brand is responding to this crisis.

- Finally, we are already witnessing shifting mindsets and behaviors within specific industries and categories. We'll continue to add and share these observations moving forward.
 - / **CPG Sector:** We're seeing a switch from perimeter shopping with a "better for you" mindset to center-of-store driven by a "comfort mindset," and consumers trying to sort out how to deliver against scratch aspirations in a shelf-stable ingredient world. We're also seeing increased engagement in personal care, home care and pet care for a variety of reasons, all driven by the need to stay at home.
 - / **Health Sector:** We're seeing a greater need and emphasis on how to continue care amidst shelter in place and the rise of telehealth. Patients are re-evaluating their health overall and dialing up the importance about better management of conditions such as high blood pressure, asthma and other chronic conditions. Boosting immunity and gaining a better understanding of how to do this with diet and supplements is also growing focus.
 - / **Lifestyle Sector:** We're seeing new behaviors in entertainment and socializing. Virtual game nights and watch-alongs. Creativity and self-expression are helping brands like YouTube and IG become as compelling as HBO. Disruptive tech platforms are gaining wide adoption. And yes, everyone seems to be stocking up on beer, wine and spirits and re-shaping what Happy Hour looks like in a virtual world.
- What are you seeing? What perspectives are you incorporating into your initiatives? We'd love to hear from you.





ADDENDUM

Reflecting on Self-Care Amidst Unprecedented Times

In the age of COVID-19, we are not only learning how to live our day-to-day lives and work within unprecedented conditions, but we are also experiencing a global, collective trauma – one that we’re all processing in our own way. Although there is no “right” way to process or cope with this trauma, we hope this resource helps you reflect on what you personally need during this time and will allow you to continue to be present for/support teams who depend on you.

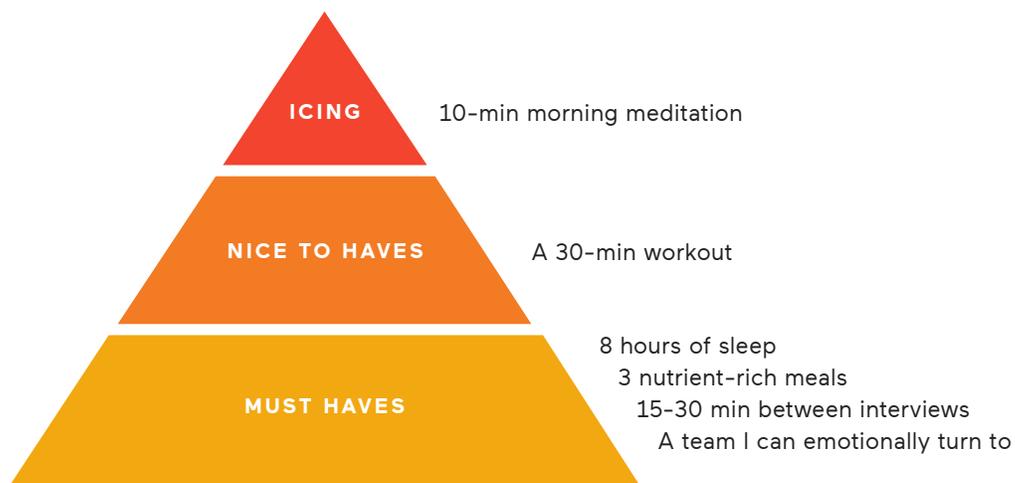
/ What do I need to feel my best?
Think about what you need in the areas of sleep, fitness, food, personal time, etc.

/ When push comes to shove, how are those needs prioritized?
Think about, what your “must haves,” “nice to haves,” and “icing on the cake” needs are. Consider using the image below to help you prioritize.

/ How will I contribute to self-care within project teams?
Think about, how often you’ll check in with one another (e.g., daily, weekly) and through what means (e.g., Ring central text, video chat, email).

/ What are some signs I’m feeling overwhelm and/or burnout?
Think about what have been signs of feeling overwhelm / burnout for you in the past.

/ When I start feeling this way, what or who will I turn to for help?
Think about what tactics have been helpful in the past, what you wish you would have done differently in the past, or even ask others for suggestions about what helps them.



Reflecting on Moderating in the Age of COVID-19

As people everywhere are processing this collective trauma in their own way, when we engage in virtual research, moderators need to be extra vigilant about the emotional health and safety of participants. Below are a few guidelines to keep in mind while moderating in the age of COVID-19:

/ Truly focus on building rapport

Depending on their situation, a market research conversation may be the only social interaction of the day. As these are uncertain times, take the time to establish a warm relationship with participants early in the discussion by showing genuine interest via our tone and non-verbal cues.

/ Make space to talk about COVID-19 (if respondent wants to)

When experiencing a collective trauma, it can feel disingenuous to pretend as if we're not living in bizarre times. Often, letting respondents have a minute to share upfront about they're doing and how their life has been impacted can help us refocus the rest of the interview on the topic at hand and places their responses within helpful current context.

/ Remain cognizant of respondents' wellbeing

Although we're all experiencing varying levels of emotion, some respondents may be experiencing heightened levels of clinically-significant anxiety and/or depression due to concerns about getting sick, shelter in place protocols, etc. While we are not mental health professionals, moderators must remain alert about respondents' responses (e.g., mention of sudden increased alcohol consumption, talk of anxiety significantly disrupting their life, excessive sleeping/disinterest in activities they used to enjoy, signs of domestic violence, etc.) and offer relevant support or resources.

1) Support them in the moment

Express genuine care and concern. Think about incorporating techniques used to create calm and alleviate anxiety like [square breathing](#) or a [grounding activity](#), etc."

2) Provide resources at end of interview

- The Crisis Text Line (text HOME to 741741) connects you with a crisis counselor anytime you need support, including anxiety about dealing with COVID-19.
- The National Suicide Prevention Lifeline (1-800-273-8255) provides 24/7, free and confidential support for people in distress, prevention and crisis resources for you or your loved ones.