

# ESOMAR

## **STATEMENT RE:**

Impact of social distancing protocols on conducting research during COVID-19 crisis

March 24, 2020

## Context

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Like every business sector in the world, the data, research and insights sector is being impacted severely by the necessary and essential government measures to manage and slow the spread of the Coronavirus to levels that can be managed by the world's health systems.

As a sector which depends on the voluntary participation of individuals, the social distancing measures that are being rolled out by an increasing number of countries have a serious impact on the advisability of conducting types of research that require people to be in close physical proximity with each other. For example, the physical presence of respondents and interviewers (F2F), research conducted by telephone requiring the use of operators in call centres, and qualitative focus groups – all of which may need to close down in order to comply with government measures and safety considerations.

## **Essential research should be encouraged to continue**

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Echoing public statements published by the ESOMAR President and the ESOMAR Director General, ESOMAR reiterates that in this extraordinary time, ESOMAR believes that more than ever decision-makers should take decisions based on solid, fact-based and unbiased evidence.

We are in a time of extraordinary change, and the data, research, and insights sector can be a critical source of such evidence, guidance and support. Essential research on both citizen's and consumer's behaviour and attitudes should be maintained and encouraged to guide us through these challenging times.

That said, our duty of care also obliges researchers to continue to evaluate the essential nature of research being conducted. Research clients and their suppliers should evaluate all non-essential research activities and in the context of our call for financial responsibility, look to potentially re-schedule and where possible maintain financial commitments to safeguard the ecosystem through this crisis.

## **Where possible, shifting to digital methodologies is part of our duty of care**

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In accordance with the ICC/ESOMAR Code, ESOMAR notes that all researchers who subscribe to the Code have a duty of care to research participants, staff, and freelancers. Should a country impose social distancing, confinement, and/or the closure of business operations that can't guarantee the required sanitary norms, then ESOMAR expects the research community to diligently comply with the requirements imposed by local authorities.

Additionally, ESOMAR invites researchers to consider the extent by which existing projects conducted using F2F methods or telephone can be moved to online methodologies. Researchers should proactively advise clients on the feasibility of making such a shift. ESOMAR, alongside GRBN and other national associations have issued guidance notes to accompany researchers who may be making the switch for the first time and these are key references to inform researchers.

ESOMAR underlines that in switching to digital methodologies, the importance of data protection and privacy remains an essential consideration. Data protection laws continue to apply, and researchers must redouble their vigilance and diligence when using digital technology. The ICC/ESOMAR Code and the ESOMAR Data Protection Checklist capture essential principles that

will guide researchers during this shift, and it would be particularly useful to conduct impact assessments for all projects whose methodology is to be transferred to a purely digital one.

### 3 Key Rules:

1. Is the research essential?
2. Can it be done online?
3. If it is essential and it can't be done digitally, follow all local authority guidance in conjunction with ESOMAR guidelines

**Physical proximity to be avoided at all possible cost. Where unique and exceptional circumstances apply, abide by ALL local guidance.**

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It has become an almost universally accepted principle that social distancing is one of the most effective practices to slow the spread of the COVID-19 virus. It is therefore ESOMAR's recommendation that only essential research is conducted and wherever required, social distancing practices be implemented, and methodologies transferred to digital means.

In practical terms, this means that for the conduct of essential research...

- focus groups should be conducted using virtual means;
- all forms of F2F interviewing should be replaced by online methodologies, and
- telephone interviewing should be conducted by what is referred to as in-home CATI, and not through CATI centres that would bring large groups of people into close proximity.

However, ESOMAR recognises and underlines that national realities vary greatly (as do the imposed measures that apply to the business community); the spread of the Coronavirus is not uniform and accordingly researchers must closely monitor the situation in each country and not close operations without conducting such a review.

In certain jurisdictions, it may be impossible for some projects to be transferred to digital methodologies because either the country's digital infrastructure or digital penetration in the market would not allow the project to reach target populations.

In such instances, where such research is considered essential and where such research is still permitted nationally - researchers must comply with national requirements and recommendations being issued by authorities and ESOMAR guidelines as enshrined by our Code and the accompanying documents relating

to the current crisis. If, for whatever reason, there is any concern that the stringent conditions associated with carrying out such research F2F cannot be met, then the research should NOT be conducted. The health and safety of our respondents and staff must be of paramount importance.

Therefore, in summary, depending on the essential nature of the project, and its time-sensitive nature, and the viability of using online techniques in the target market, ESOMAR urges that physical proximity be limited as far as is possible. Be sure to review and promote the option(s) for shifting research online, and only as a last resort - in markets where it is still permitted and where the research is deemed 'essential' – should consideration be given to F2F in-person research – and then with all appropriate special measures as defined in local government directives.