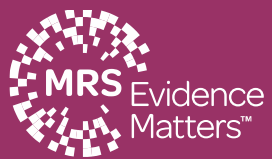




Representation in Research Commercial Benefits Study



Representation in Research
Steering Committee





Today's speakers



Matt Reynolds CMRS

Managing Director Vitreous World
Voices4all Founder



Bex Grove

Associate Director Vitreous World
Voices4all Founder



Special thanks to...



Presentation Overview

- Why are we here?
- Approach & Methodology
- Addressing common beliefs
- Research Findings
- Conclusion and Q&A



Why are we here?

Industry standard for Nationally Representative adult sample in the UK has been based on:

- Age
- Gender
- Location
- Sometimes socioeconomic status

Overlooking minority groups, from ethnic minorities to the LGBTQ+ community and disability - representing approx. 30% of the population

An approach which risks driving headlines, marketing campaigns, and product development that don't reflect the full variety of human experience

Example of unconscious bias in the industry

The Commercial Benefits study is a case study for how to deliver a more inclusive approach

Acknowledging it is morally right to be more inclusive and exploring potential commercial benefits missed when using the traditional approach



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Introduction

Investigating and understanding if there is a commercial benefit to more representative UK research projects is the next step in the current work being done by the MRS Representation in Research group.

This research was designed as a starting point for exploring the commercial benefit(s) of a more inclusive approach.

Omnibus research method

2,000 UK respondents

Cost effective
(£250-£350 per question)

Fast
(48 hours)

Age | Gender | Region of Residence | + Social Grade (ABC1)



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Approach

- Taking advice from the wider work undertaken by the MRS Representation in Research group we decided to test how the historic approach to Nat Rep would compare to a more inclusive approach to Nat Rep.
- For the more inclusive approach we have adopted the methodology recommended by Voice4all which adds quotas on Ethnicity, Sexual Orientation and Disability to Age, Gender, Region of Residence and Social Grade.
- Minority group quotas are benchmarked against the latest government 2011 Census and ONS data.
- The combination of the additional quotas set out in the Voices4all approach delivers a combined minority group representation which makes up 30% of the overall sample and a solid platform for comparison between a traditional and more inclusive approach.



Methodology

An approach designed to...

See how different quota setups and questionnaire wording impact data at a topline level

Taking care to deliver each dataset...

- Within 48 hours
- With trusted industry suppliers
- With commercially available services at the same relative cost level

How this was achieved...

- 4 separate Omnibus projects
- Each slightly different
- Testing the traditional approach to quotas vs an inclusive approach
- Then the traditional approach to questionnaire wording vs an inclusive approach



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Methodology continued

Data Set 1

N=2,010 completes

Non-inclusive
questionnaire design

Data Set 2

N=2,009 completes

Inclusive
questionnaire design

Data Set 3

N=2,013 completes

Non-inclusive
questionnaire design

Data Set 4

N=2,004 completes

Inclusive
questionnaire design

Quotas

All data sets:

Age | Gender | Region | Social grade

Ethnicity | Sexual orientation | Disability



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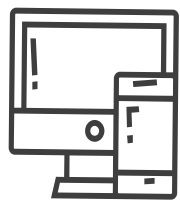
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Questionnaire

The questionnaire was developed by a number of stakeholders within the MRS Representation in Research group and selected 5 topics to explore with the consumer respondents.

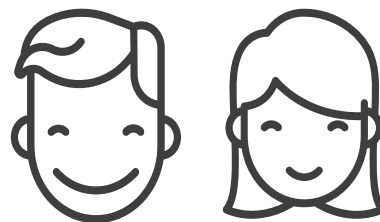
These topics were selected due to a combination of factors, the first priority being subjects that are highly relatable to the audience and the second being areas of high potential commercial interest to researchers and clients.



**Media
Consumption
& Advertising**



Food



**Beauty &
Skincare**



**Environment &
Sustainability**

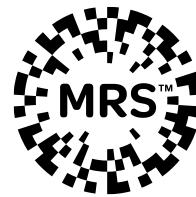


Covid-19



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Fieldwork Timings

Data set	Soft Launch	Full Launch	Total FW Time
Data Set 1	26/05 3.30pm – 26/05 8.00pm	30/05 2.00pm – 01/06 1.00pm	51.5 hours
Data Set 2	26/05 1.00pm – 26/05 1.30pm	30/05 2.00pm – 31/05 4.30pm	27 hours
Data Set 3	26/05 1.00pm – 26/05 1.30pm	30/05 2.30pm – 31/05 4.30pm	26.5 hours
Data Set 4	26/05 1.00pm – 26/05 1.30pm	30/05 4.00pm – 01/06 1.30pm	46 hours



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Addressing common beliefs



No. 1

It will cost more to do this

QUOTE:

“Clients need to have the budget to pay for it”



No. 2

Demographics don't
affect opinions

QUOTE:

"Sexual orientation does not have
a bearing on opinions"



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No. 3

Ideally we should be interlocking things like age and ethnicity but this makes things difficult

QUOTE:

“To get really good data for these groups we should really consider age within ethnicity/sexual orientation but this becomes incredibly difficult to sample.”



No.4

We don't yet know what targets we should be setting on these

QUOTE:

"Lack of decent ONS data to know what quotas to set"



No. 5

Subgroups are often too small to analyse

QUOTE:

“Very small sample sizes difficult to model from”



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No. 6

Fieldwork will take longer if we include minority quotas

QUOTE:

“We need to be careful not to make the research so time consuming to complete that it is no longer conducted”

Total FW Time

Data Set 1 51.5 hours

Data Set 2 27 hours

Data Set 3 26.5 hours

Data Set 4 46 hours



No. 7

You cannot reach these groups via online panels

QUOTE:

“Nearly always under represented and hard to reach” OR “Incidence is often low in panel samples”



No. 8

People will just tick
'Prefer not to say'

QUOTE:

"People simply prefer not to say in all types of research methodologies" OR
"Unwillingness to disclose"

Demo Question Type	% of PNTS Answers
Gender Question	0-1%
Age Question	1-2%
Region of Residence Question	0-1%
Ethnicity Question	0-1%
Sexual Orientation Question	2%
Social Grade (SEG) Question	1%
Disability Question	3%



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Commercial Benefits Research Selected Findings



Sample Definitions

Overall sample groups discussed

Total Sample

Mainstream Sample

Any Minority Group

Subsets within 'Any Minority Group'

Disabled

LGBTQ+

Any Ethnic Minority



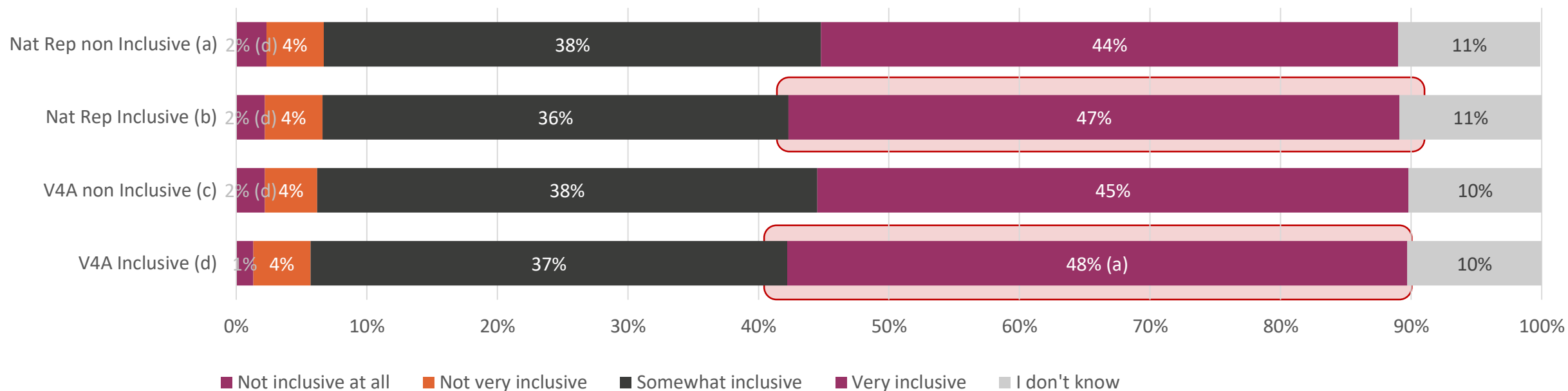
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Sample Inclusivity

More inclusive sample respondents (both Nat Rep and V4All) rated the survey as being 'very inclusive' - the V4A inclusive sample significantly more so. This is not driven by differences in minority group responses – so a broader portion of the sample felt this way.



E2 How inclusive did you find this survey?

Base: All respondents: Nat Rep non Inclusive=2010, Nat Rep Inclusive=2009, V4A non Inclusive=2013, V4A Inclusive=2004



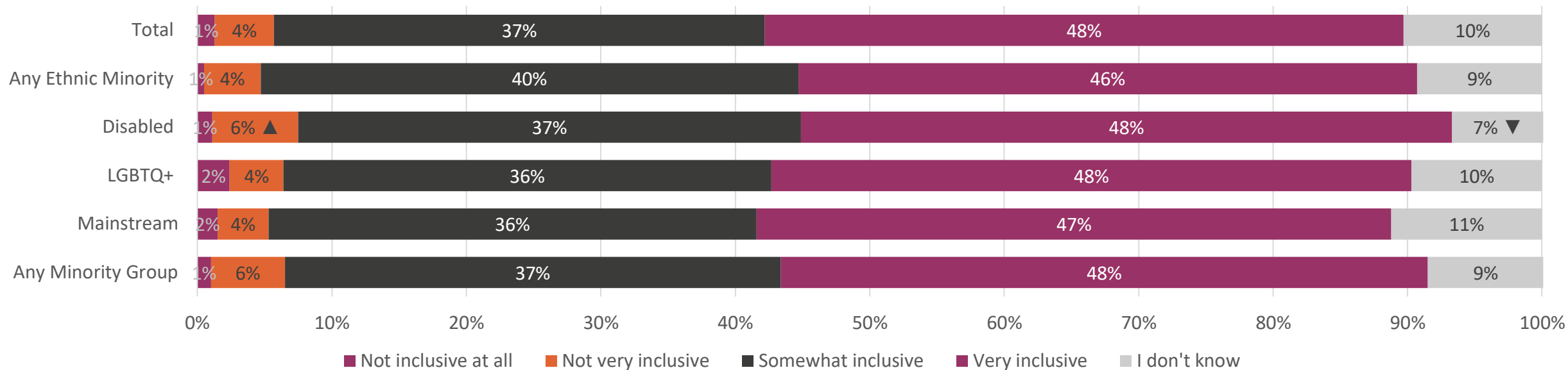
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Sample Inclusivity

There were few significant differences in dataset 4 – however there were signs that disabled respondents found it less inclusive than the other minority groups.



E2 How inclusive did you find this survey?

Base: All respondents: Total=2004, Any Ethnic Minority=215, Disabled=455, Mainstream=1307, Any Minority Group=697 Significance test: Confidence level 95%. ▲ ▼ over/under Mainstream.



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Dietary Requirements



Q9 How would you describe your personal dietary requirements?

Base: All respondents: Nat Rep non Inclusive=2010, Nat Rep Inclusive=2009, V4A non Inclusive=2013, V4A Inclusive=2004 Significance test: Confidence level 95%.

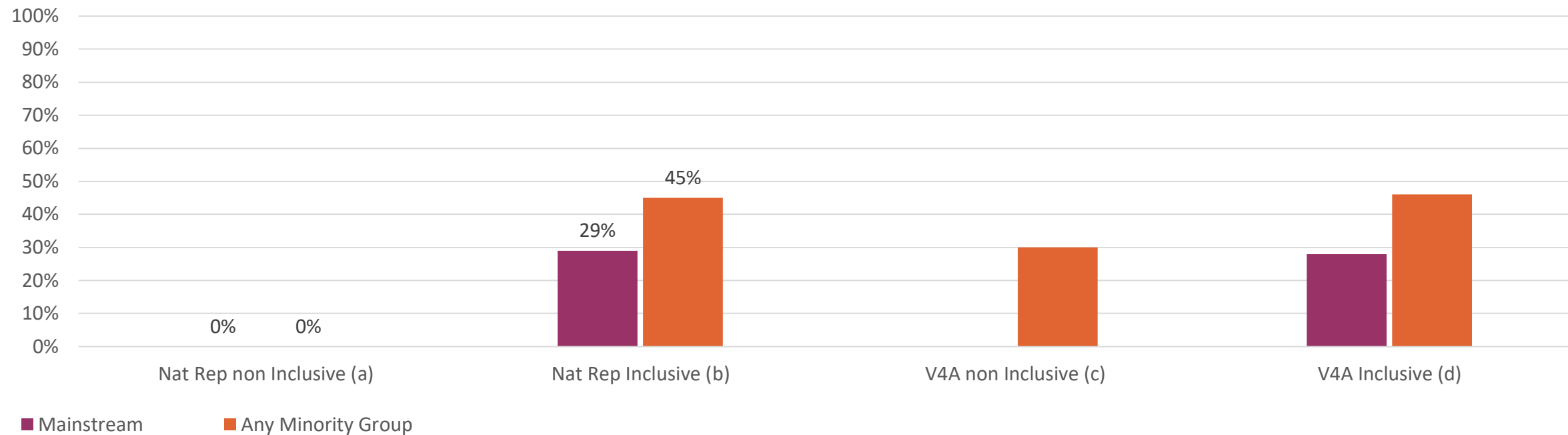


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Dietary Requirements



Q9 How would you describe your personal dietary requirements?

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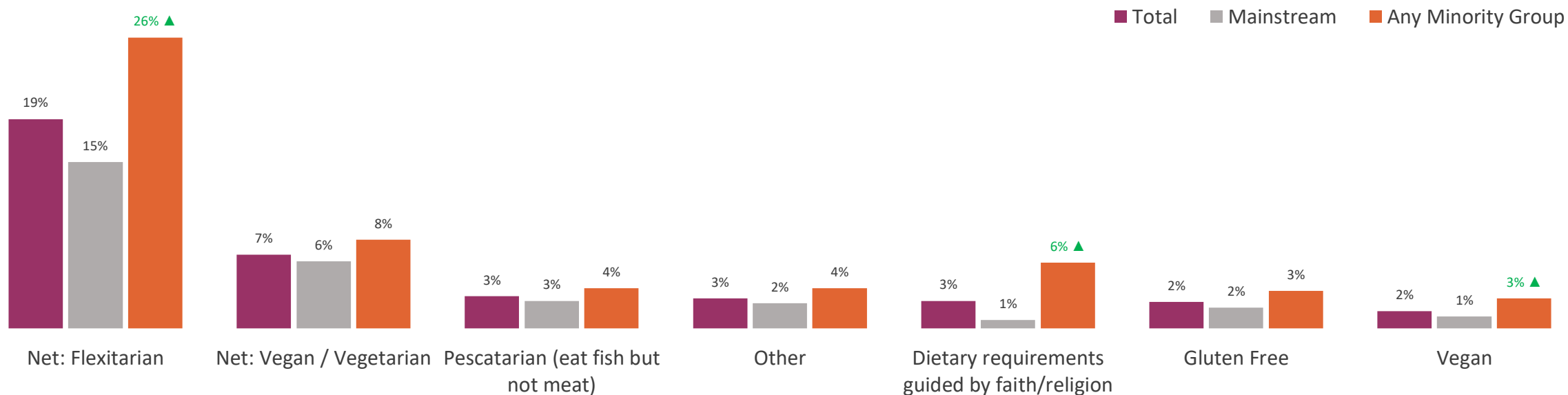
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Dietary Requirements

Ethnic minority sample over-indexes on faith/ religion influencing their diet and reducing red meat/ all meat and dairy intake, disabled respondents are also more likely to say they reduce meat & dairy in their diet



Q9 How would you describe your personal dietary requirements?

Base: All respondents: Total=2004, Any Ethnic Minority=215, Disabled=455, Mainstream=1307, Any Minority Group=697 Significance test: Confidence level 95%. ▲ ▼ over/under Mainstream.



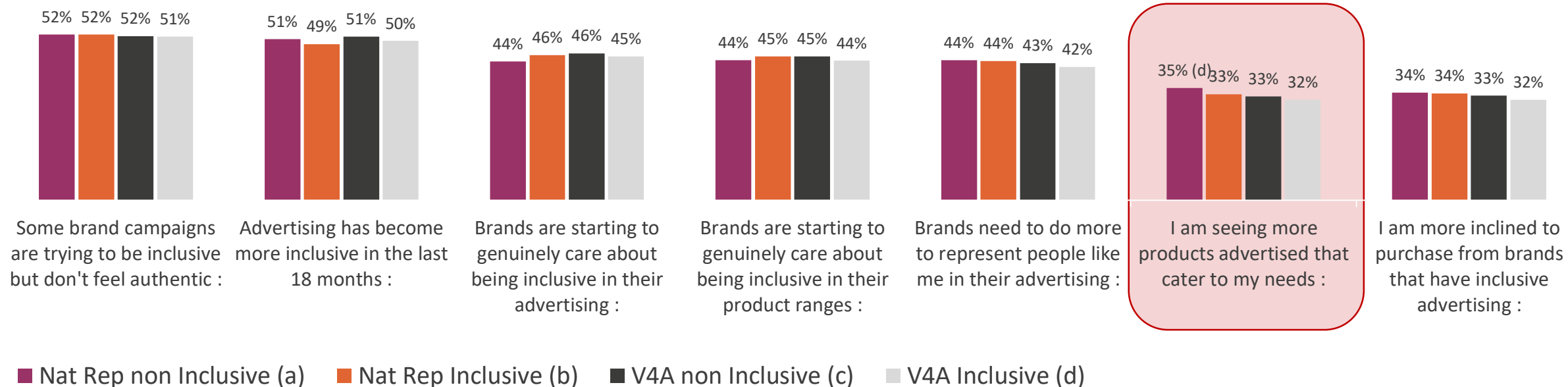
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Inclusivity in Advertising

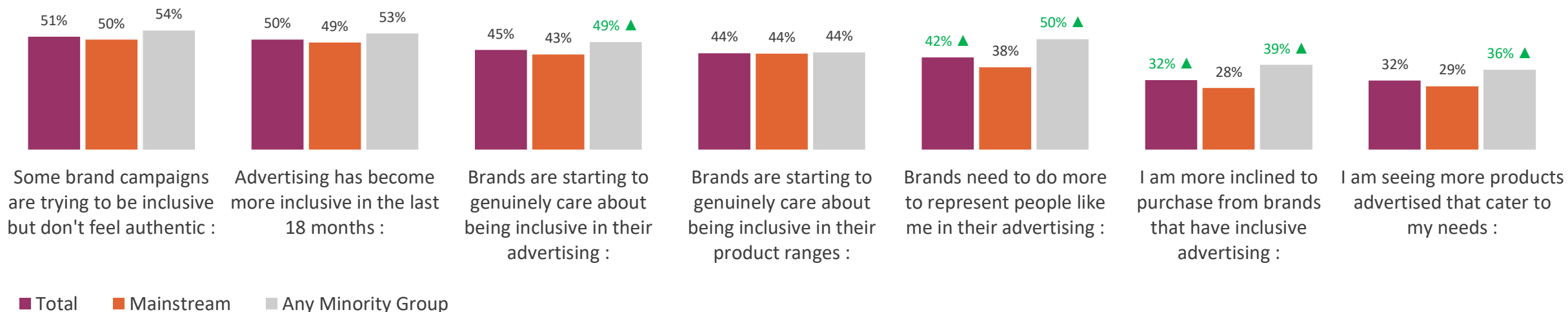
Respondents were asked to look at a series of statements and say to what extent they agreed or disagreed with these. The below shows the net T2B Agree percentages given across all four datasets.





Inclusivity in Advertising

Looking specifically at dataset 4: All minority groups over-index on wanting to see more people like themselves represented in advertising, whereas only LGBTQ+ respondents feel this has improved in last 18 months. All groups agree they'd be more likely to buy to purchase from brands that are more inclusive in the way they advertise - and this carries across to total sample data.



Q30 Summary table - T2B Agree

Base: All respondents: Total=2004, Mainstream=1307, Any Minority Group=697 (Any Ethnic Minority=215, Disabled=455, LGBTQ+=124) Significance test: Confidence level 95%. ▲ ▼ over/under Mainstream.



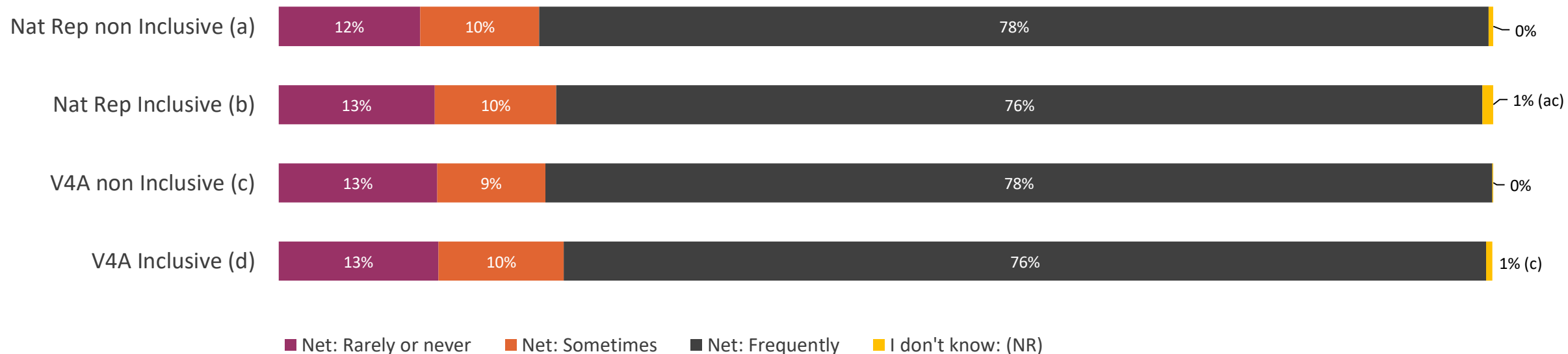
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Social Media Usage

There are no significant differences in Social Media usage across the samples at a total sample level, but this masks dynamics beneath the surface.



Q3 Use social media (e.g. Facebook, Twitter, Instagram etc.) - How often, if at all, do you do any of the following activities?

Base: All respondents: Nat Rep non Inclusive=2010, Nat Rep Inclusive=2009, V4A non Inclusive=2013, V4A Inclusive=2004 Significance test: Confidence level 95%.



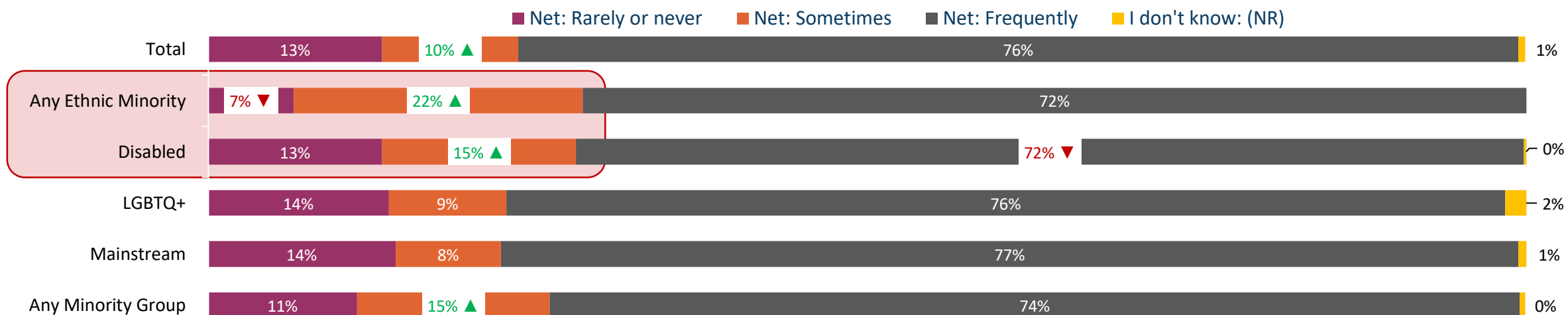
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Social Media Usage

Ethnic minority and disabled respondent groups use social media significantly less often, which is having an impact on the total level results



Q3 Use social media (e.g. Facebook, Twitter, Instagram etc.) - How often, if at all, do you do any of the following activities?

Base: All respondents: Nat Rep non Inclusive=2010, Nat Rep Inclusive=2009, V4A non Inclusive=2013, V4A Inclusive=2004 Significance test: Confidence level 95%. ▲ ▼ over/under Mainstream



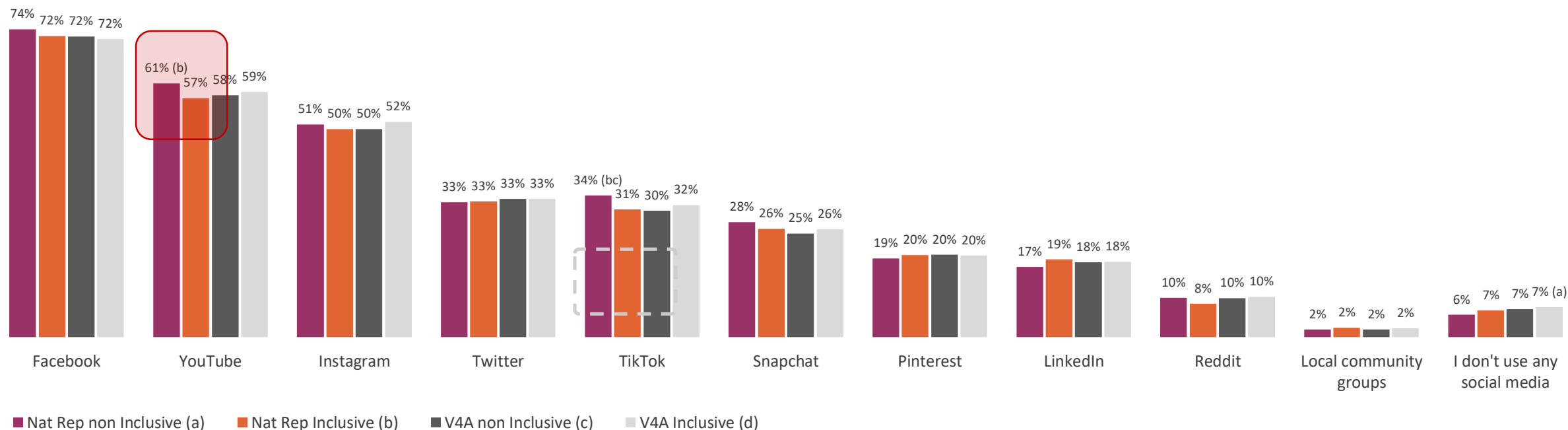
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Social Media Platform Usage

The social media platforms people are using differs very little from sample to sample, but there are multiple dynamics beneath the surface.

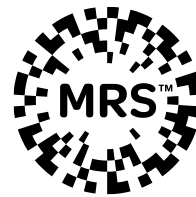


Q1 Which, if any, of these social media platforms do you use nowadays?

Base: All respondents: Total=2004, Any Ethnic Minority=215, Disabled=455, LGBTQ+=124, Mainstream=1307, Any Minority Group=697 Significance test: Confidence level 95%. ▲ ▼ over/under Mainstream.

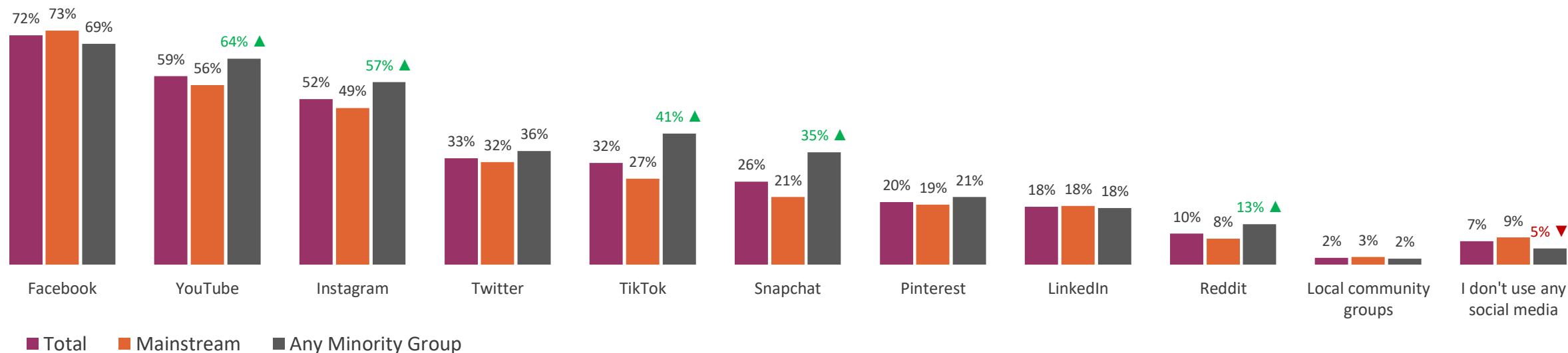


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Social Media Platform Usage

Minority groups - especially ethnic minorities and LGBTQ+ respondents – are more likely to use certain social media platforms than mainstream groups – especially YouTube, Instagram, TikTok, Snapchat and Reddit.



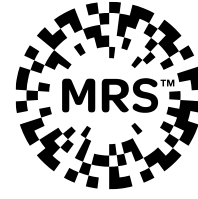
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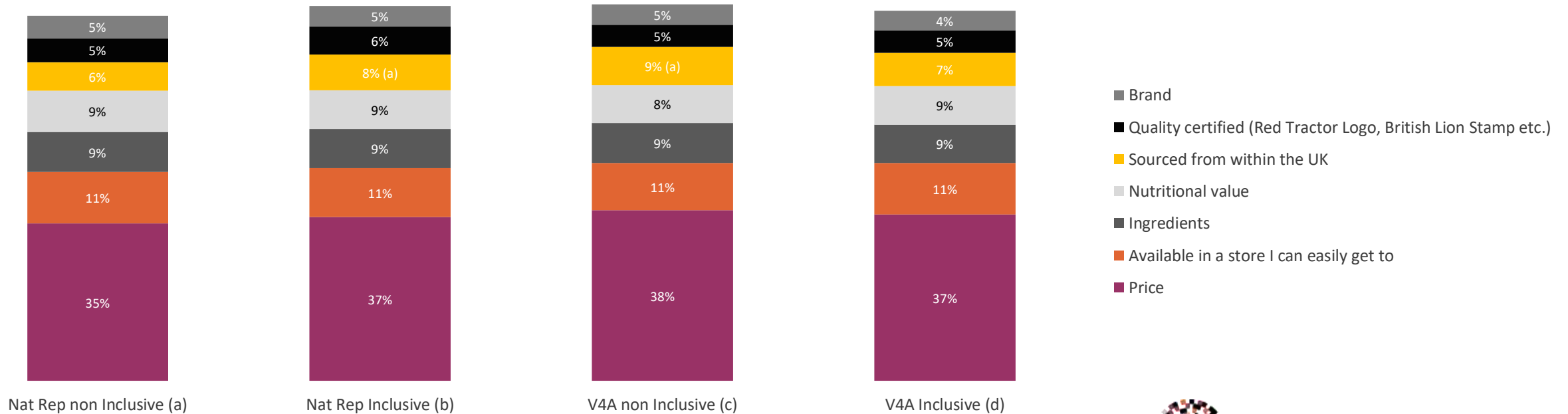
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Important Factors When Buying Food/Household Groceries? (Ranked 1st)

Attitudes in shopping didn't vary particularly across the samples, price was the most important factor across the board, however we saw ethnic minority groups in particular discussing other priorities.



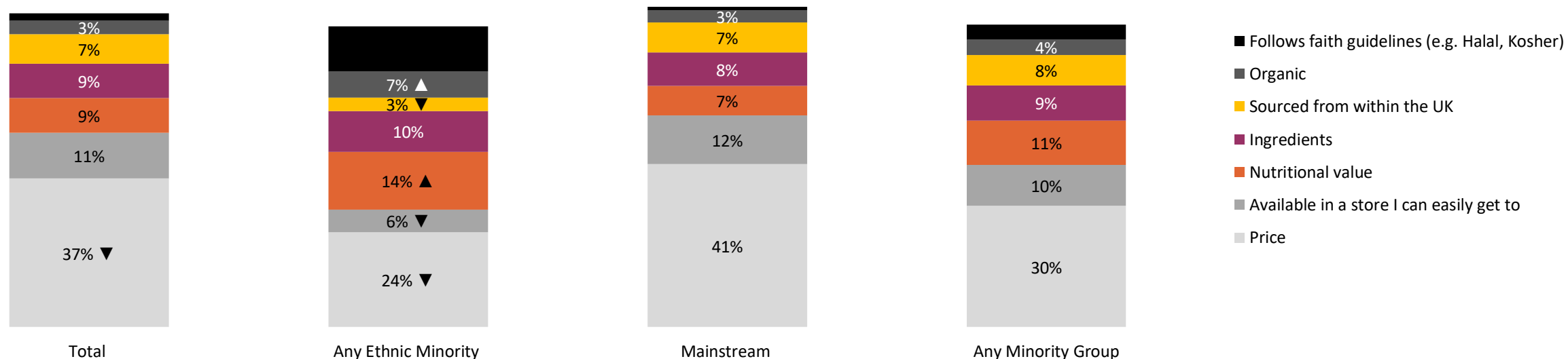
Q10 What is most important to you personally, if anything, when you are buying food/household groceries? (Ranked 1st)

Base: All respondents: Nat Rep non Inclusive=2010, Nat Rep Inclusive=2009, V4A non Inclusive=2013, V4A Inclusive=2004 Significance test: Confidence level 95%.



Important Factors When Buying Food/Household Groceries? (Ranked 1st)

Here we saw a significant divergence in answers from the mainstream; especially when focusing on the any ethnic minority group. Price, availability and sustainability are of lower importance, whereas nutritional value, being organic and following faith guidelines are more important. The difference in importance of price is impacting the total sample responses.



Q10 What is most important to you personally, if anything, when you are buying food/household groceries? (Ranked 1st)

Base: All respondents: Total=2004, Any Ethnic Minority=215, Disabled=455, LGBTQ+=124, Mainstream=1307, Any Minority Group=697 Significance test: Confidence

level 95%. ▲ ▼ over/under Mainstream.



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Conclusions

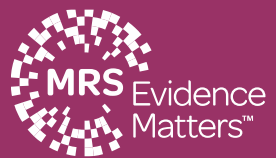
- Unconscious Bias is established when unfounded opinions become beliefs
- We hope that the presentation today has proved beyond any doubt that there is no genuine barrier to any industry stakeholder including Minority Groups in our base level Nat Rep Methodology for Online UK Research
- There is a clear and strong commercial opportunity to access and understand the currently untapped views of these groups which collectively make up a third of the UK Population
- This more inclusive approach is available in today's market and carries no cost premium

We are hugely grateful for the opportunity to share our findings with you. We are here to support you and welcome any questions or feedback



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Thank you for listening.