Covid-19 Lockdown:
The Long-term Potential Impact on the UK's Face to Face Research Sector

18th June 2020

Summary

1. In May 2020 the Department for Digital, Media, Culture & Sport (DCMS) asked MRS to explore the potential impact of a long-term Covid-19 lockdown easing and/or multiple Covid-19 lockdowns on the UK's market, social and opinion research sector, specifically the impact on face to face research data collection. The aim of this paper is to outline the critical issues and the potential cascade impact should the UK's face to face research sector diminish.

2. In summary the key impacts if face to face research were to diminish:
    - Loss of a leading UK success story: the UK research sector is currently a global leader and innovator for research and one of the cornerstones of this success is face to face research.
    - The need to protect and support 6,000 interviewers who undertake face to face research, 1,500 viewing facility and participant recruiters plus 500 qualitative researchers all of whom are dependent on face to face data collection.
    - Reducing the robustness, quality and representativeness of research results.
    - Undermining the face to face research business model which could impact on the long-terms sustainability of face to face research in the UK.
    - Exacerbating social demographic inequalities with some segments of society (e.g. the elderly, the vulnerable, certain ethnic groups) losing their ability to contribute to research.

3. The MRS recommendations are:
    - The Government to promote the resumption of all public sector face to face research projects.
    - The Government to invest in more research: at a time when understanding of society is crucial, the research sector can provide the insight Government needs.
    - If a second lockdown is necessary, the Government works with MRS to enable face to face data collection to continue.
    - The Government consider introducing sector grants to enable the research sector to kick-start innovation and business confidence.

About the Market Research Society (MRS)

4. The Market Research Society (MRS) is the UK professional body for market, opinion and social research, insight and analytics. MRS is the world's largest research association, representing 5,000 individual members and over 500 accredited Company Partners in over 50 countries and has a diverse membership of individual researchers within agencies, independent consultancies, client-side organisations, the public sector and the academic community.

5. MRS promotes, develops, supports and regulates standards and innovation across market, opinion and social research and data analytics. MRS regulates research ethics and standards via its Code of Conduct. All individual MRS members and Company Partners agree to regulatory compliance of all their professional activities via the MRS Code of Conduct and its associated disciplinary and complaint mechanisms.

About Market, Opinion & Social Research

6. Market, opinion and social research is the systematic gathering and interpretation of information about individuals or organisations using the statistical and analytical methods and techniques of the applied social sciences to gain insight or support decision making.

7. Market, opinion and social research plays a key role in helping businesses and other constituencies better understand consumers, customers and citizens in developing goods and services and is essential for economic efficiency, innovation and progress. Social and opinion research is widely used by public bodies to understand citizens' preferences and measure key performance indicators.

8. Research in of itself does not seek to change or influence opinions or behaviour. Unlike marketing, advertising, or other commercial communications, it does not seek to promote the aims or ideals of those who conduct or commission it. While research is used by marketers to test their products or messages, it is not a commercial communication.

About the UK Market, Opinion and Social Research Sector

9. The UK's market, opinion and social research sector is one of the countries success stories. The UK is a £4.8bn research market that continues to dominate in terms of research spend per head of population: £76.74 per capita in 2017[1]. It is the second largest research market in the world, second to the US, where spending per capita is £48.42, and France and Germany at £28.39 and £26.09.

10. There are circa 3,100 active registered businesses in the UK listing market research and opinion polling as their primary activity, and a further 1,700 listing market research and opinion polling as a subsidiary activity.[2] [3]

11. There are circa 42,000 individuals employed within the research supply-side sector of which circa 30,000 are full-time and 12,000 part-time. Of these circa 10,000 are classified as interviewers (face to face and telephone) most of whom will be retained as workers on zero rated contracts and will work across a range of research businesses (on average circa 5) at any given time.

12. The most recent set of UK League Tables for the research sector identified that beyond the top 27 all the remaining suppliers were classified as SMEs.[4] Whilst the sector is

[1] Research-live Industry Report 2019: https://www.mrs.org.uk/pdf/MRS_RESEARCH%20LIVE%20REPORT_2020_FINAL.pdf
[2] Research-live Industry Report 2019: https://www.mrs.org.uk/pdf/MRS_RESEARCH%20LIVE%20REPORT_2020_FINAL.pdf
[3]https://www.ons.gov.uk/businessindustryandtrade/business/businessservices/datasets/uknonfinancialbusineseconomyannualbusinesssurveysectionsas
4 The MRS Research & industry League Tables (UK) 2018, Top 100 Individual Agencies Ranked by Turnover. The threshold of £25mn was used to identify those the SME/large split. To view the League Tables see: Research-live Industry Report 2019: https://www.mrs.org.uk/pdf/MRS_RESEARCH%20LIVE%20REPORT_2020_FINAL.pdf

clearly dominated by SMEs, the vast majority of the SMEs will work with the larger suppliers, e.g. as sub-contractors, supplying specialist skills and services, working in collaboration and so on. As such the success of the UK's research sector is dependent upon the entire research supplier ecosystem - all businesses, large and small - being supported.

13. The UK's face to face research sector has actively and positively responded to the challenges of Covid-19 by devising innovative ways to reduce risks and to enable safe working whilst undertaking face to face research. As part of this MRS has introduced a suite of safe working guidance to assist practitioners in understanding their obligations ensuring that they and participants are safe whilst undertaking face to activities. Guidance includes

    - MRS Post-Covid-19 Lockdown Guidance: Undertaking Safe Face to Face Data Collection
    - MRS Post-Covid-19 Lockdown Guidance: Undertaking Safe Face to Face Mystery Shopping
    - MRS Guidance note for interviewers and participants who are 70 years and older

UK Face to Face Research Data Collection

14. The last MRS Annual Survey reported that over 60% of all qualitative research was face to face and circa 30% of quantitative.[5] Face to face qualitative research includes a range of techniques such as focus groups, depth interviews, ethnographic observation, and new product/prototype testing. Face to face quantitative techniques include survey interviews, audits, mystery shopping and product testing.

15. Research can take place in a range of environments including in participant's homes or in central locations where participants assemble to take part in research such as in research viewing facilities or other venues such as hotels, village halls, community centres, etc. Research is also undertaken in situ for example in transit (on public transport), in shops, bars, exhibitions, parks, schools/universities, leisure venues, etc, indeed anywhere where people congregate face to face research can take place.

The Advantages of Face to Face Research

16. Over the last 15 years, online research techniques have grown in the UK. During this period of online growth, telephone research has slowed whilst face to face methods have remained more stable. Whilst the Covid-19 crisis has meant that some projects have changed mode from face to face to online, postal or telephone research, many research commissioners aim to resume face to face data collection. The reason for this is that face to face research techniques have unique advantages compared to the other methods. In summary, the advantages of face to face data collection for research purposes are:

    a) *Representative samples*

    Face to face quantitative research remains the best way to undertake random probability sampling. Random sampling is a variety of techniques which sample participants are selected at random with a known probability of selection. Using random samples is the only way to produce representative research which is crucial for certain types of research particularly public policy research and media measurement (BARB, etc.) which underpins media advertising models. Random

[5] Research-live Industry Report 2019: https://www.mrs.org.uk/pdf/MRS_RESEARCH%20LIVE%20REPORT_2020_FINAL.pdf

probability samples and methods form the fundamental foundation of the scientific principles which is core to the rigour and representativeness of research.

Whilst online data collection can be a more cost and time effective data collection method it is not suitable for many projects due to digital exclusion.

The number of adults in the UK who have never used the internet or have not used it for 3-months (which is described as 'internet non-users') was 5.3mn adults in the UK which is 10% of the adult UK population.[6] There are regional variations with some areas such as the North East, North West, South West and Wales with the highest number of the population with zero basic skills.[7] Significantly an increasing proportion of internet non-users are aged 65 years and over, with more women than men within this category.[8]

b) Response rates

Certain research commissioners, particularly public sector and media measurement require high response rates which can only be gained by face to face data collection. There are certain groups of participants which can only be reached via face to face methods: those that are digitally excluded (see above), older age groups and vulnerable adults (many of whom will only participate in face to face data collection), and certain ethnic groups where cultural norms require face to face engagement.

Without face to face research some of these groups could be excluded from research resulting in unrepresentative results and significant segments of the UK could be excluded from being able to represent their views.

c) Quality of response

Face to face research allows for more in-depth data collection which produces results which enable more comprehensive understanding of participants' attitudes and behaviours. Some topics are also easier to discuss in a face to face environment than by telephone or online e.g. health research.

Participants in face to face settings are more likely to fully engage with research and to provide more insight. For some types of research, particularly qualitative research, this can include assessment of body language and facial expressions.

Much face to face quantitative interviewing is solely or partially administered via interviewers which enables research to be contextualised and explained, including enabling interviewers to probe for explanations of responses. Overall, this approach reduces the likelihood of misunderstandings and enables participants to provide responses which reflect their views.

Long-term Impact of Lockdown on Face to Face Data Collection

Quantitative Research

17. There are a wide range of issues that a long-term lockdown would create for face to face data collection:

a) Response rates

It is still unclear how much the Lockdown has affected individuals in terms of their willingness to engage with strangers in face to face activities. The research sector is

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[6] OMS, Exploring the UK's digital divide: https://www.ons.gov.uk/peoplepopulationandcommunity/householdcharacteristics/homeinternetandsocialmediausage/articles/exploringtheuksdigitaldivide/2019-03-04

[7] Lloyds Bank UK Consumer Digital Index, 2018

[8] ONS, Internet Users, Labour Force Survey, https://www.ons.gov.uk/businessindustryandtrade/itandinternetindustry/bulletins/internetusers/2019

considering the impact that the current lockdown measures will have on human psychology and behaviour. As Lockdown measures are easing the response rates will be assessed for a variety of environments: including the willingness of the public to engage in face to face research in their homes (currently on the doorstep only), in-street, in-store and in research facilities.

Whilst there is one large-scale face to face project which is being undertaken, the Public Health England and Social Care project that is tracking the rate of infection and recovery rates, which has good response rates, it is not typical of a face to face project. For example all participants have opted-in, the project is to help understand more about the Covid-19 infection (which is more likely to gain the support of the public) and the testing and survey does not take as much time.

It is as yet unknown whether participant response rates will revert to pre-Covid-19 levels. If response rates do not revert to pre-Covid-19 levels, this will add pressure from research clients and commissioners on research suppliers to meet targets. Inevitably compromises will need to be undertaken which could weaken the robustness of any research produced.

b) Data continuity and moving to other methods

Research clients and commissioners that undertake continuous and/or repeated waves of research prefer to do so using the same research design and data collection methodology.

Lockdown and the temporary closure of face to face data collection has meant that some commissioners have stopped data collection (for example RAJAR for radio media measurement) whilst others have switched methodology (for example the British Crime Survey switching to telephone). Whilst alternative methods e.g. online, telephone and postal research provide research data, all of these methods are unable to provide the coverage, representativeness and quality of response which face to face provides.

In the months since lockdown a number of commissioners elected to switch methods to ensure the continuity of research outputs. This included a government department which switched one of its studies to online methods. It has been reported that this government department has stated its intention to resume face to face research as the quality of response from online was non-comparable to that achieved by face to face methods.

Undoubtedly there may be some switching to either other modes or more mixed modes (where a range of data collection methods are used). The question is whether the switch is so significant, with large numbers of contracts moving methodologies and/or decreasing face to face data collection, that the face to face business model is no longer becomes sustainable.

c) The face to face business model

The current face to face business model is built on three large UK suppliers which have large field forces that service the sectors which commission large scale face to face random probability and quota research projects, particularly public sector and media measurement. The existence of these large-scale continuous projects enables smaller scale continuous face to face to be undertaken (e.g. some of the public transport passenger surveys) plus a range of ad hoc face to face projects.

It is essential that the fundamental economic and business infrastructure which supports face to face data collection and research is supported and strengthened. By doing so, this ensures that thousands of individuals, the skilled field force, who provide the face to face services are protected.

d) The Field Force

The 6,000 practitioners who undertake face to face research (with the remaining 4,000 being telephone practitioners) are highly skilled and knowledgeable interviewers, many of whom have undertaken research interviewing for many years. The interviewers are skilled in undertaking highly technical and sensitive interviewing (such as for many social research projects when interviewers may be asking questions about crime, health, income, etc.).

Years and years of interviewer capability and expertise need to be protected and supported. This skilled interviewer workforce is located in all regions and countries of the UK, with an estimated 50% of interviewer practitioners aged 55 years and older, indeed many are 65 years or older and rely upon face to face data collection to earn an income and to avoid financial hardship.

Qualitative Research

18. There are equally significant impacts of a long-term lockdown on qualitative research:

a) *Quality of response*

Many of the quantitative issues also apply to qualitative research such as decreasing response rates due to fears about face to face contact plus the transfer of face to face qualitative research to online methods. Whilst online groups and depth interviews can deliver high quality research the face to face experience still tends to deliver more useful in-depth insight.

b) *Employment*

Most qualitative research practitioners are employed in either small research agencies or are self-employed/freelancers. Since the Covid-19 lockdown many qualitative projects were put on hold, and others were diverted to online qualitative techniques. Due to the delay between the commissioning of a research project, its completion and payment, many qualitative practitioners are going to struggle to survive. There is insufficient qualitative work to enable all practitioners to continue to work. It is estimated that 25% of this sector, representing 500 practitioners, could become unemployed if face to face qualitative research cannot swiftly resume.

19. **The Cascade Impact**

The cascade impact would be:

- *Social demographic impact*

  If the volume of face to face research and data collection decreases, this would create significant business challenges to the wider face to face business model.

  There could be significant parts of the UK where it could no longer be cost effective or sustainable to undertake face to face research – resulting in a loss of voice for certain socio-economic groups that alternative forms of data collection are unable to reach.

- *Loss of a leading UK success story*

  The UK's research sector is a global leader and innovator, and the strength of this reputation depends on success in all techniques, particularly random probability and the use of face to face data collection.

  One of the cornerstones of post-Brexit UK is to export British business successes. The UK research sector is one such success story; to ensure that this success is sustained into the future support for face to face research sector is needed.

- *Supply-chain*

All face to face research has a long supply-chain of professions and suppliers which will be directly affected by any decrease in face to face research.

For example, viewing facilities and recruitment services: these are centrally located venues where face to face discussions and testing take place. There are circa 60 viewing facilities throughout the UK, each of which will employ on average 5 staff. In addition, facilities retain services of part-time workers and freelancers who supply supplementary services (e.g. recruitment services for qualitative groups) for which it is estimated a further 1,500 are employed. This sector is dependent upon face to face research.

Other service providers such as data processing, transcription, translation would be similarly affected if face to face data collection is unable to resume.

- *Graduates and recruitment*

  With the significant fears about the sector's ability to maintain the current workforce new recruitment, such as graduates and apprentices (the sector has a Trailblazer group developing a market research apprenticeship), are likely to be severely affected.

  Furthermore, with fewer opportunities the talent recruitment sector for research will struggle to survive.

Recommendations

Based upon the breadth and depth of potential impacts on face to face research and data collection as a result of Covid-19 and the lockdown, we strongly recommend that the government provides significant support to the research section. The key recommendations for action are:

1. The Government to promote the resumption of face to face research by recommending that all public sector projects paused or delayed as a result of Covid-19 are re-started. Not only would this ensure that Government is getting the quality of research and insight evidence it needs (and which in many cases only face to face can provide) such an action would encourage non-public sector research commissioners to resume their projects. Business is currently lacking confidence to resume research; the Government can provide the confidence that the sector needs.

2. The Government to encourage government departments, the second largest buyer of research, to lead the way by investing in more research (across all techniques). Understanding of society issues has never been more crucial. By investing in more research, the Government gains greater society insight and at the same time provides vital economic support to the UK's research sector. A win-win scenario.

3. If a second lockdown or extended lockdown is envisaged, as a result of a resurgence in infection rates the Government works with MRS and its stakeholders to devise ways in which face of face data collection can continue and be supported in a moderated form. This would directly benefit Government's own on-going research programmes, such as the Public Health England and Social Care project which is tracking the rate of infection and recovery rates.

4. The Government to consider introducing sector grants to enable sectors to kick-start innovation and business confidence. For example, MRS is keen to undertake a promotional campaign promoting the benefits of research to society and business. As a small association MRS is unable to fund this, particularly since the association's

resources are being directed to provide vital support to MRS members. If, however sector grants were available this kind of activity would be possible.

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