MRS D&I in samples

2nd November 2021

Executive Summary

As part of its diversity and inclusion strategy, MRS has formed a steering committee to look at representation in research including sampling. Qualitative research with clients, agencies and panel providers was convened to explore how they are approaching this topic with a view to understanding how people are approaching diversity and inclusion today, how Nat Rep is defined, whether it is still useful and relevant and barriers and best practice around more representative samples.

Seven key points

1. It starts on the inside

"Diversity and inclusion, it's not just a trend. It's something that makes strategic sense for any corporate business, and it should be a policy, if it's not already the case, that goes across not only from client-facing documentation but also internally and the onboarding of professionals into different positions in every single department." (Client)

Companies across the board are taking D&I seriously though this manifests in vastly different ways. For larger companies, internal policy has been more enshrined, and teams have been set up to ensure that there's more representation in the workforce through specific policies and charters. Initiatives range from internships for under-represented communities, giving talks in schools and colleges, taking on A-level students rather than undergrads, and training within existing teams. This happens more organically for smaller companies or those with a younger staff, who often have naturally more diverse workforces who may also be tapped into more diverse communities.

This has a knock effect on research – there's a very clear desire to recognize the changing landscape when it comes to sampling but a lack of clarity as to the best way forward. Everyone recognizes that it's early days.

Many teams have seen a rise in the number of specific D&I projects since the Black Lives Matter movement though there's fewer mainstream projects including a D&I quota. That isn't to say that this isn't a hot topic, it's just a much harder one to resolve.

2. Everyone has a role…but no one is taking full responsibility

"I think if we all agreed on what the standards should be, by all means we should have them, but I don't think we are there yet, are we?" (Client)

Each party in the chain of research acknowledges their responsibility in affecting change but is also looking to the other parties to take on their share. They recognise that they are limited alone and there's a slight frustration that not everyone is taking on an equal share of the load, betraying an inherent lack of confidence while everyone is trying to find their feet to define best practice.

Clients recognize that they have the clout to influence change and they want to work with agencies who both demonstrate an appetite to understand the issue, as well challenge their own assumptions. In some cases, rosters are being relooked with this in mind and while D&I criteria isn't hard and fast, many companies will ask for an agency point of view on it as part of their RFP process, along with detail of the team who will work on their business.

Agencies are grappling with when to take D&I issues on board, how it might affect the overall picture of what they're trying to achieve, and when to push back. With such a sensitive topic, there's discomfort at getting it wrong. And agencies, in turn, request the same of the panel providers.

For the panel providers, they want to be clear on whether the level of granularity in a sample will affect the outcome, and if it might, they need to have access to the right sample. Hard-to-reach audiences don't reside on classic panels, raising questions around who should fund investment into getting them involved – is it an industry effort? The client who is paying for the research (who's often up against competing demands of representation, time, and money)? The panel provider who will reap the benefits over the longer term but will have to self-fund the investment in the meanwhile? Given the commoditization of sample, increased costs are a significant consideration.

3. Nat Rep needs to change

Nat Rep is almost universally defined as age, gender, region and as the baseline though this interpretation varies between suppliers. There's a pragmatism to accepting a 'good enough' approach. Other data points are then added as needed, most commonly social economic grade (SEG), but there is an inherent frustration with this. People question whether it's fit for purpose in today's more agile world.

Given that ethnic minorities make up just under 15% of the population, how should they be represented? And how should samples take this into account? The challenge is in being clear about how the data will be used, and whether there's a need to record this sensitive data simply as a matter of good practice. This is less of an issue for specific D&I projects but raises serious concerns for the majority of work in the mainstream sector.

"Maybe it's finding what is the happy middle? You know, what is the proxy? Is there a way? What is the way to interlock some corners to get to a good enough representation of some groups that are currently under-represented, without ever asking them, 'Are you from this group? Are you from that group?'" (Client)

4. We need to find a common definition

In terms of definitions, the sector needs to be clear on how to define and standardize the terms used as well as how transparent to be to participants in the screening process as to why the questions are being asked and how they're being reported back.

5. Finding sample – how and who will pay?

While D&I specific projects often require booster sample, which is paid for as part of the project cost, having harder-to-reach people sign up for longer term panel commitments is difficult and will require extra effort and resource. Face to face interviewing is also challenging given that interviewers can feel intimidated going into new areas or areas in which they are a minority themselves.

Who will pay for the investment in finding sample is part of this? Specialist online groups are helpful in this regard but at the moment there isn't enough demand to justify investment – the tipping point hasn't been hit.

In addition to this, there are practical issues around:

> Language – how to find and talk to non-English speakers; regionality - what to do when researching with those for whom English isn't their mother tongue, there are obvious issues around finding them and asking them to enrol onto an English-speaking panel to which they can accurately respond.
>
> Regionality - clearly some regions are more diverse than others.
>
> Global legislation – law varies by market, making global mandates very challenging.

6. The participant experience needs sensitive handling

Question order, wording and the effects on benchmarks and existing data and privacy all need to be considered, with best practice defined for:

> **How questions are asked –** order clearly matters. Changing orders will affect data that has been tracked and benchmarked and can also affect how people answer if they identify with more than one grouping. However, there is a strong desire to move away from the majority response being listed first, for example "White" on an ethnicity question, and a suggestion that moving towards alphabetical ordering would be better.

Prefer not to answer. A prefer not to answer options should always be offered, but there can be an issue with “unwillingness to disclose” i.e., if too many people select the prefer not to answer option it makes it difficult to then quota on the question.

Considering the effects of closing for quotas on sensitive questions. Are the questions inadvertently going to put off the very people they are trying to attract, i.e., if one has an interview stopped due to a closed quota after answering a question on sexual orientation or ethnicity, then what will they deduce from the process? Is that a positive experience for them?

Sensitive data. While GDPR issues are in the main reasonably well understood now, the issue of asking for and holding sensitive data is still an issue of concern, with the need to share data files through the research process. Where data points can be held separately, e.g., through aggregators, this is less of an issue

7. The role of market and social research

All of this brings into question the value of market and social research to society, and how to impart that to prospective participants. It’s important that participants know why they are being contacted and how their input will be used. What is the value that they are adding and receiving? Transparency is key.

In conclusion

There’s a clear appetite to do the right thing, and a recognition that sampling approaches need to better align with the cultural currents. But there are multiple barriers and a real call for the sector to come together as a whole to:

- Develop a clear and united point of view on best practice with the understanding that this will likely be a set of broad principles rather than hard and fast rules. Within this, a set of guidelines or tiers/grades of Nat Rep may be helpful.
- Give the research community the confidence that they can recommend the right approaches without being judged as insensitive if they conclude that requested sample breaks aren’t relevant.
- Educate research participants on the role of research, the decisions it influences, and the risks of being overlooked through non-participation.

Acknowledgements:

With thanks to Caroline Whitehill and Acacia Avenue for conducting this research on behalf of MRS.