



# MRS Roadshow 2020

## Supporting the sector now and after lockdown



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### Scotland

2-3.30pm, 24 June

### Wales & N. Ireland

1-2.30pm, 25 June

### England

11am-12.30pm, 2 July



## Today's agenda

Welcome

Research results – Industry research on Lockdown effects

Jane Frost CEO

How MRS is working with government

Debrah Harding, Managing Director

Support for the sector

Helen Oldfield, Sales & Marketing Director

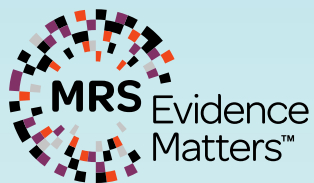
Q&A

Your questions to MRS

Final thoughts

Finish

# MRS industry research on the effects of Lockdown



W A T E R M E L O N



# 176 research industry leaders took part in the survey

## Fieldwork ran from 23rd April – 10th May 2020

### Organisation type

Full service agency (mixed methodology)	99
Independent consultant	29
Full service agency (quant specialist)	15
Full service agency (qual specialist)	13
Fieldwork/tabulation services	6
Data preparation & processing	3
Data analytics	3
Qualitative recruitment/viewing facilities	3
Support services (translation, transcription, etc)	1
Something else	3
Prefer not to say	1

### Number of employees

0-9 people	86
10-49 people	51
50-99 people	16
100-249 people	8
250 people +	14
Prefer not to say	1

### Turnover last FY

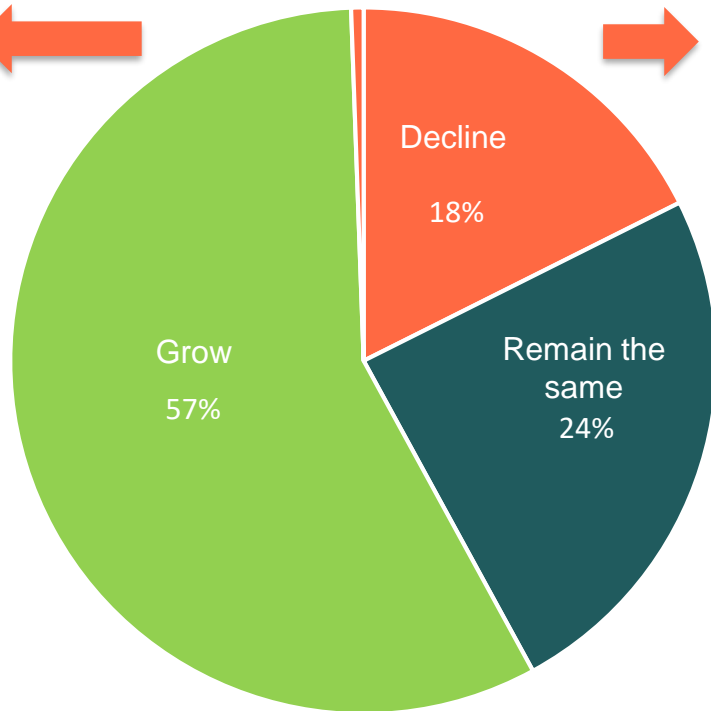
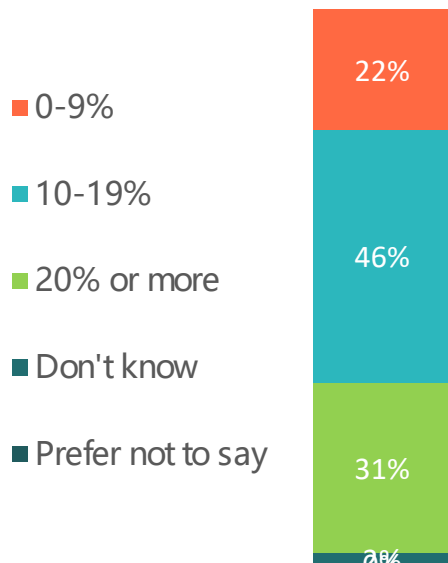
Up to £1m	90
£1m - £5m	39
£5m - £10m	22
£10m - £25m	7
£25 - £50m	4
£50m +	6
Prefer not to say	8

### Methodologies & techniques offered

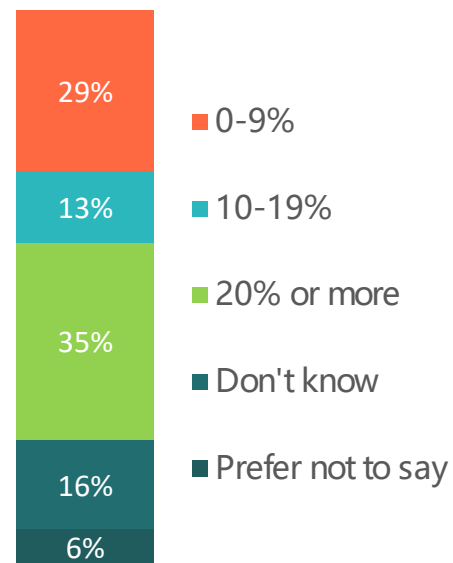
Analysis & reporting	142
Face to face qualitative	133
Online data collection (quant)	122
Strategic consultancy	118
Online qualitative	114
Telephone qualitative	113
Face to face data collection (quant)	85
Data processing	85
Telephone data collection (quant)	84
Qualitative recruitment	79
Data analytics	72
Paper/postal data collection (quant)	53
Mystery shopping/observation/audits	42
Sample/panel management	33
Viewing facilities	21
Transcription/translation	11
Prefer not to say	1
None of these	2

# Almost six in ten research businesses were forecast to grow this year, and almost half of those by between 10 and 19%

Business predicted to grow by...



Business predicted to decline by...



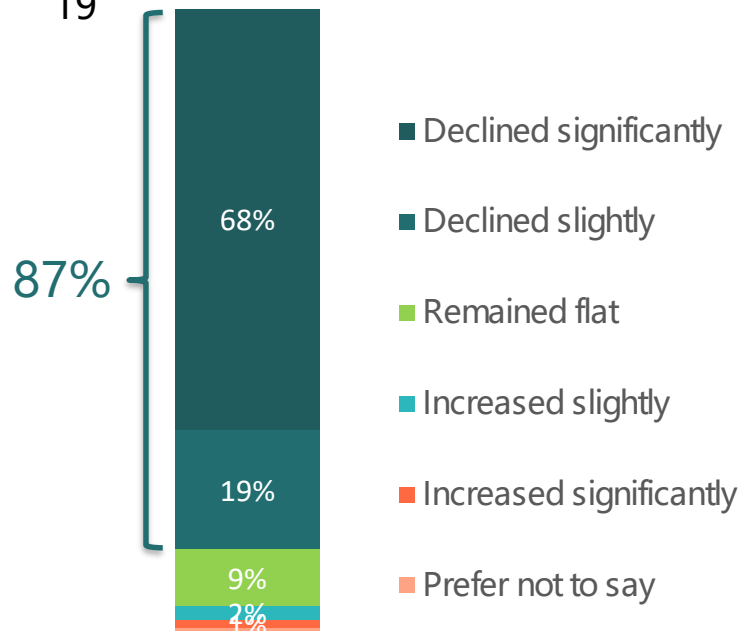
More likely to predict decline: Smaller businesses - 0-9 employees (21%) 10-49 employees (24%) vs 50+ employees (3%)

More likely to predict growth: Larger businesses - 50+ employees (84%) vs 0-9 employees (42%) 10-49 employees (65%)

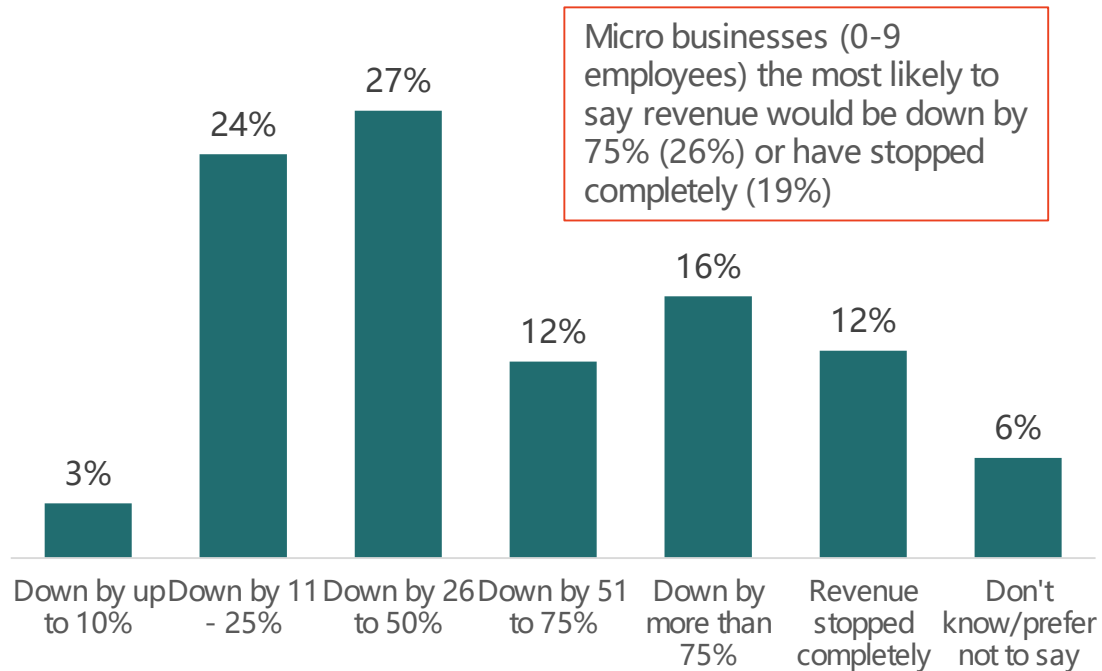
# The vast majority of research businesses have seen a negative impact on their revenue

and most anticipate a decline of more than 25%

## Impact on revenue since beginning of COVID 19

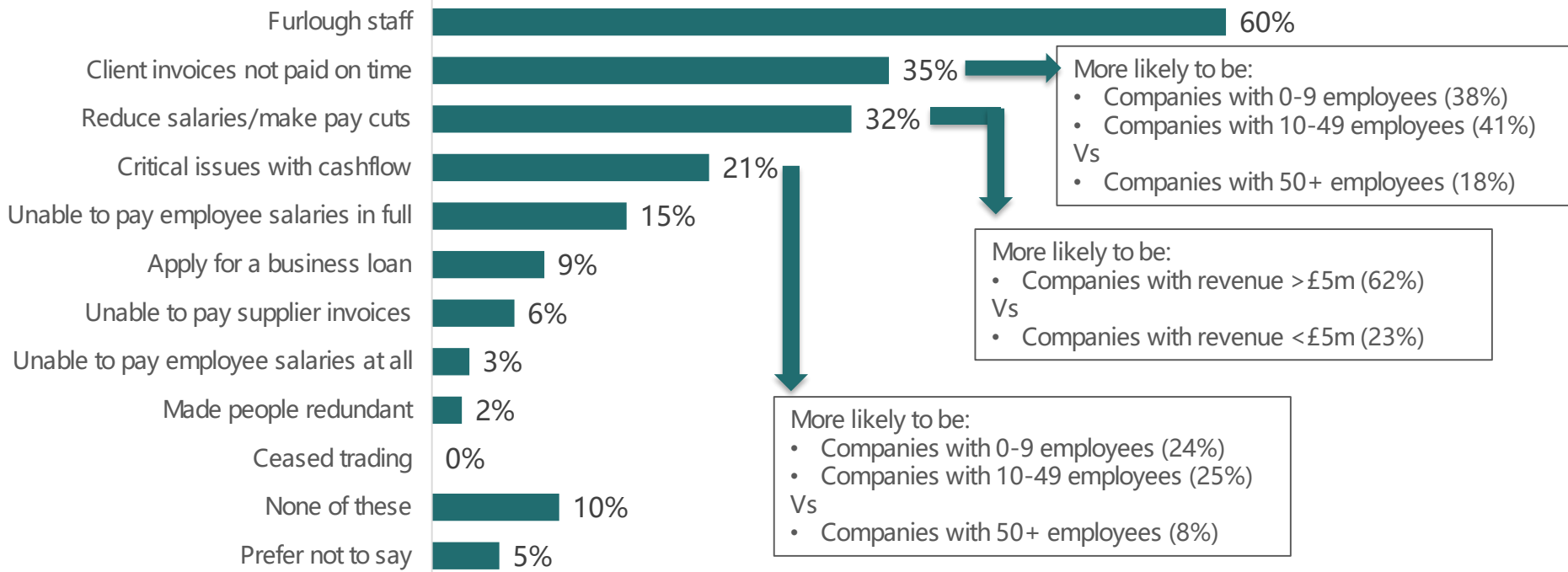


## Predicted impact on revenue due to COVID 19

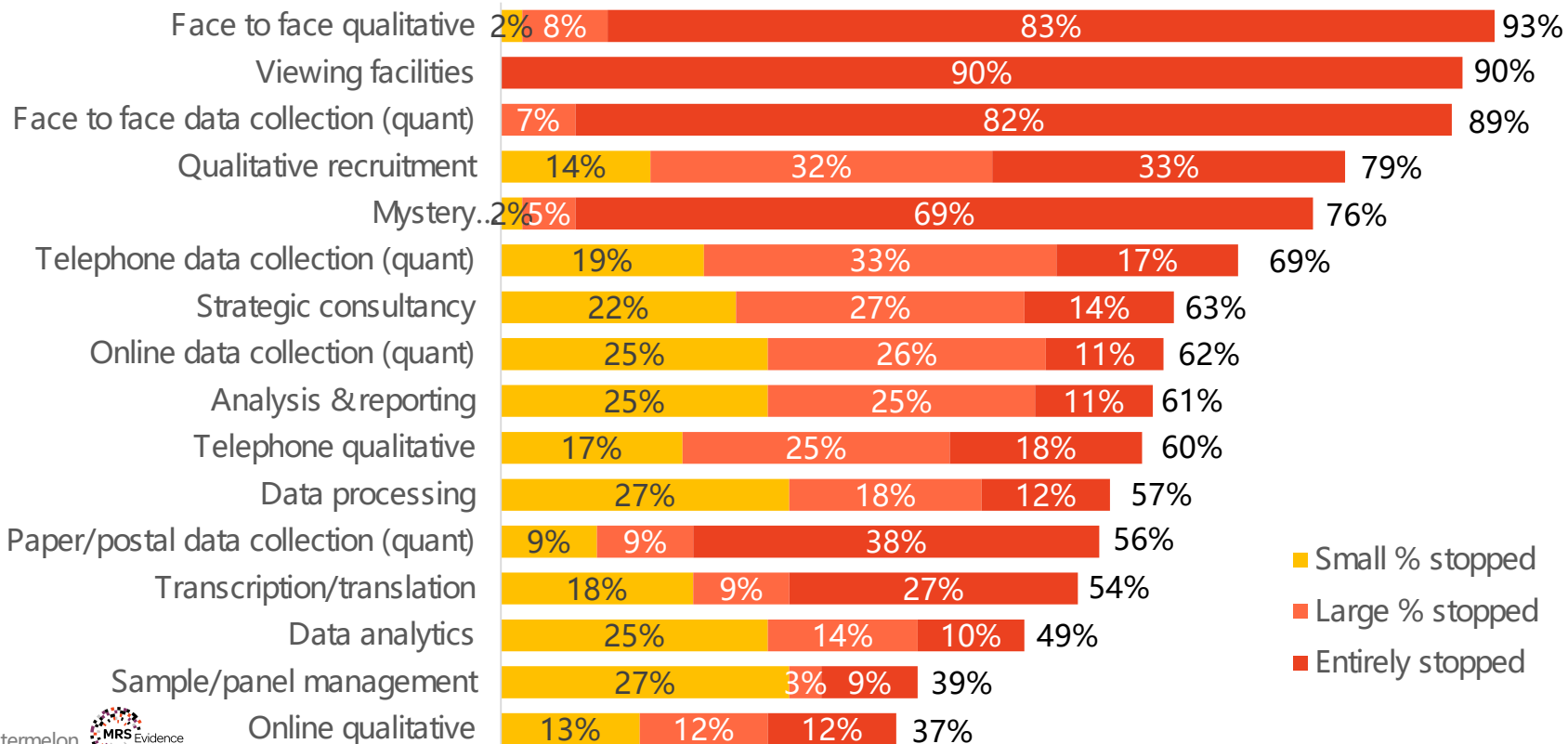


# The major impact for businesses in the sector is on staff, with more than half having furloughed staff and others reducing salaries or struggling to pay their employees

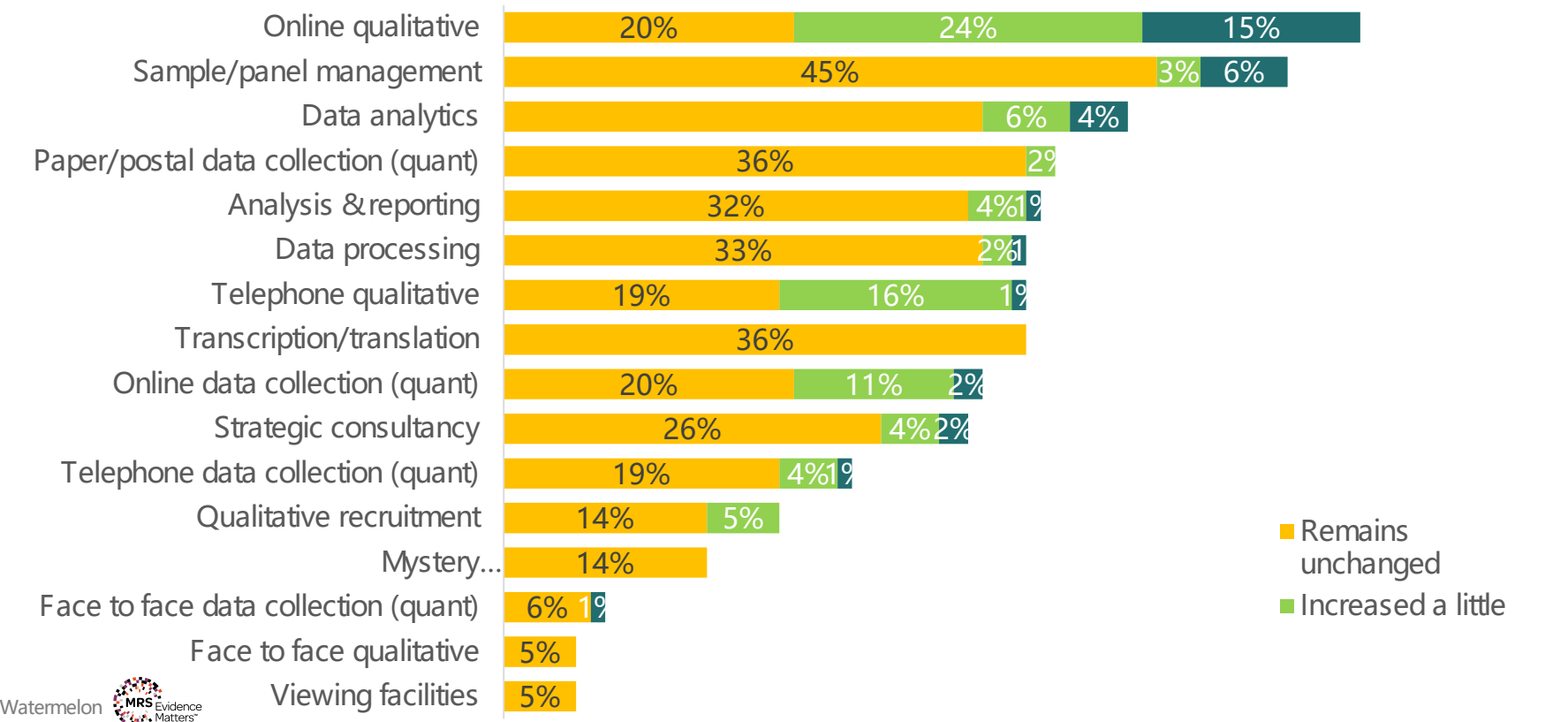
## How businesses already affected since COVID 19 outbreak



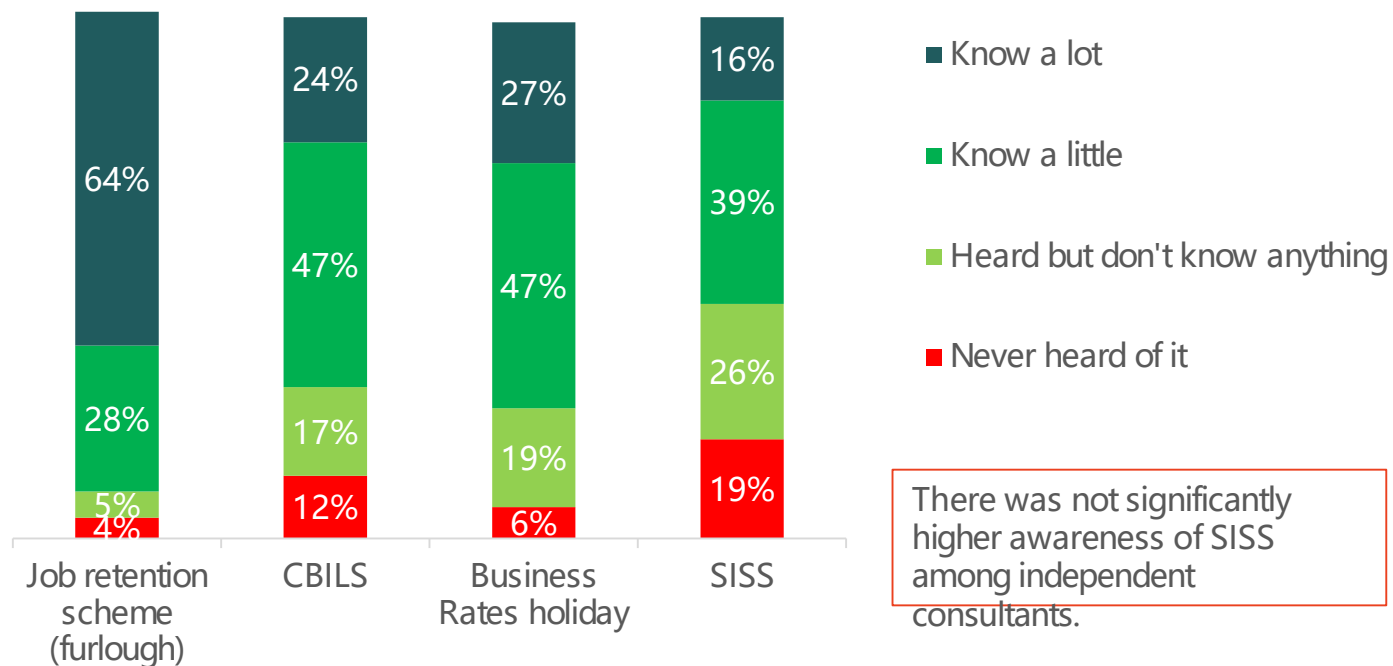
# Face to face research has been seriously affected with almost all of both face to face qualitative and quantitative activities halted.



Online qualitative research has had the only real positive impact from the current situation, with some growth as people switch from face to face. Sample/panel management is the least affected with almost half saying this area remains unchanged.

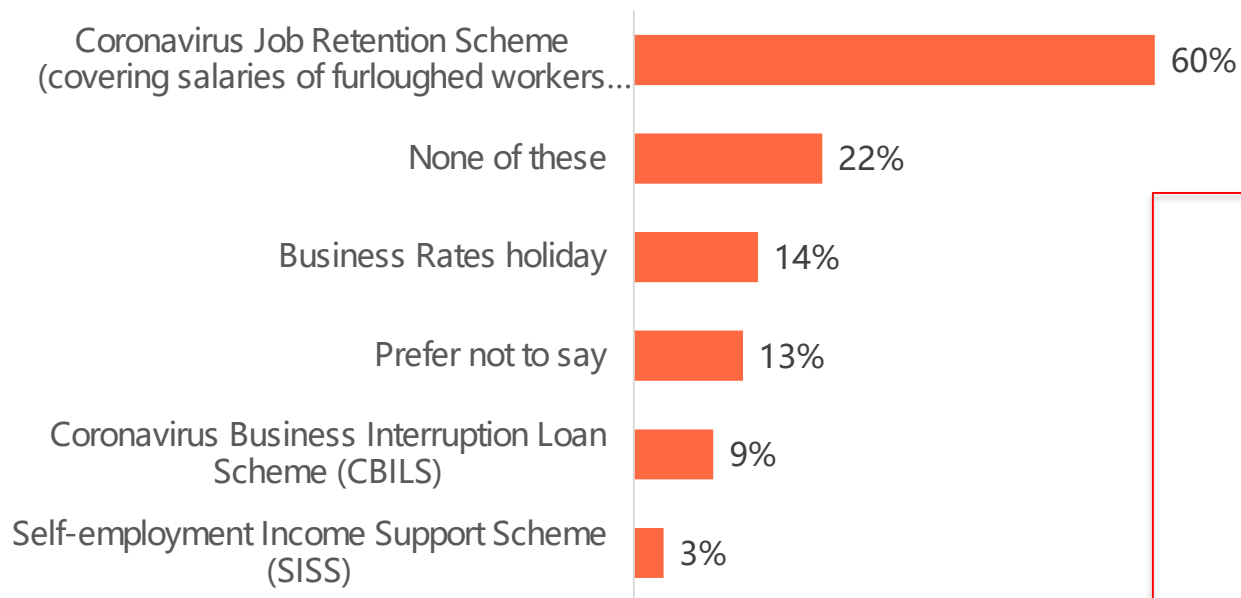


**The Coronavirus Job Retention scheme, providing businesses with funding for furloughed workers,** is the scheme that most people have some understanding of, with the Self-Employed Income Support Scheme (SISS) the least well known.



**Six in ten companies have applied for the government's job retention scheme,** significantly more than for any other form of support, with more than half finding it a relatively easy process.

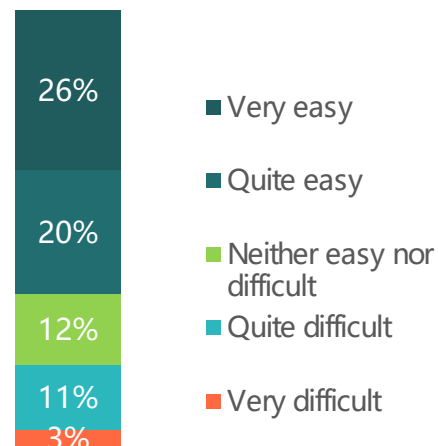
### Support schemes applied for:



More likely to be:

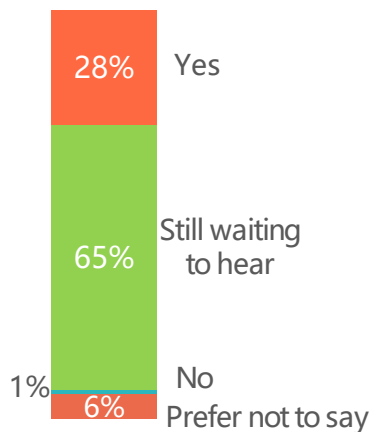
- Companies with 10+ employees (73%) Vs 0-9 employees (47%)
- Companies with revenue >£1m (77%) vs <£1m (48%)

### Ease of applying for job retention scheme:

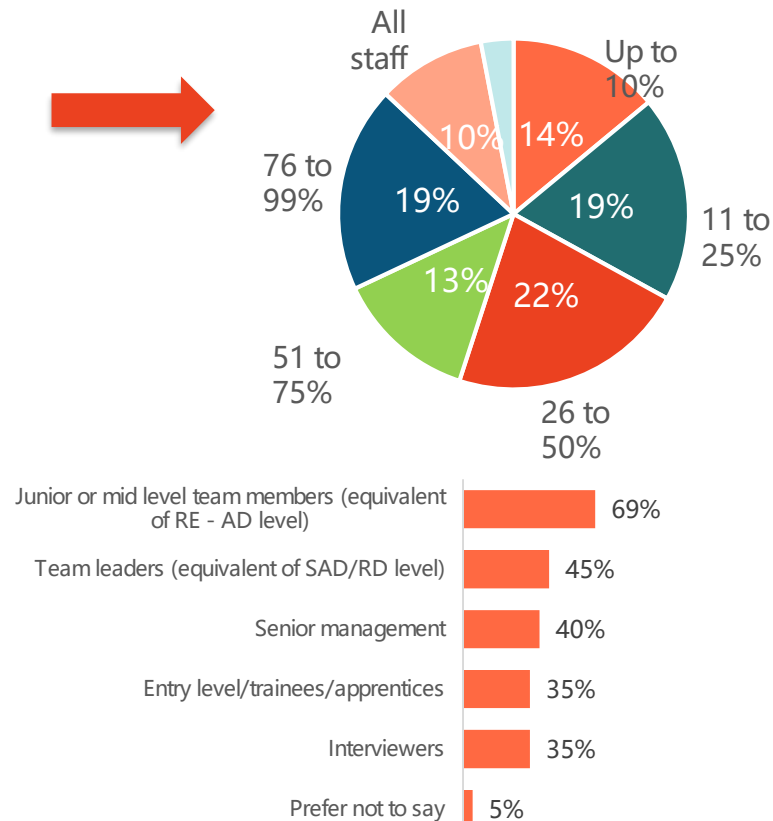


**Two-thirds of those who have applied for government support on furlough are still waiting to hear if they were successful,** but almost all have already furloughed staff. Those in furlough work across a range of job functions, and are most likely to be junior/mid level employees.

Whether application for job retention scheme was successful



**94%** of those who applied for scheme have now furloughed staff



**For the other business support schemes, the majority of businesses were also still waiting to hear about the outcome,**  
although those who had heard were more likely to have been successful than unsuccessful.

### **CBILS**

16 people told us they had applied for the Business Interruption Loan:

- 12 only applied to one financial institution
- 3 were successful
- 13 were still waiting to hear

E1. How many financial institutions did you apply to for the CBILS scheme?

E2. Was your application for CBILS successful?

### **Business rates holiday**

25 people told us they had applied for a business rates holiday:

- 8 were successful
- 1 was unsuccessful
- 10 were still waiting to hear

Councils applied to were located across the UK, including:

- Camden
- Southwark
- Manchester
- North Tyneside
- Belfast
- Hull

F1. Was your application for a business rates holiday successful?

F2. Which council have you applied to for the business rates holiday?

### **SISS**

6 people told us they had applied for the Self-Employed income Support Scheme:

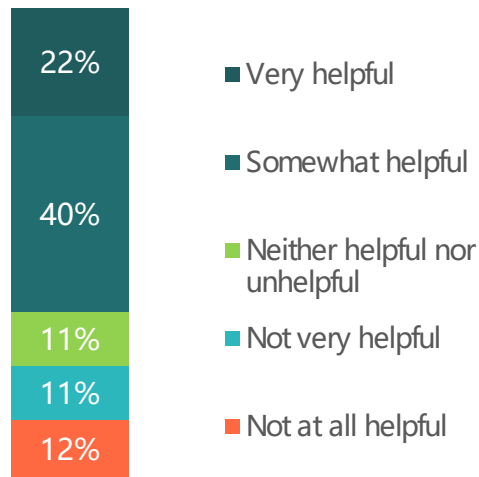
- 1 was successful
- 5 were still waiting to hear

G1. Was your application for the Self Employment Income Support Scheme (SISS) successful?

## government schemes helpful to them to some degree, but one in five haven't found them helpful.

The main concerns stem from businesses who fall through the gaps or aren't specifically covered.

### Helpfulness of government schemes for businesses in the research & insight sector



Micro businesses more likely to find schemes unhelpful

- 0-9 employees - 40% unhelpful
- 10+ employees - 6% unhelpful

Watermelon



### What's been helpful...

"Given us breathing space to keep people on rather than cutting staff immediately."

"Furlough is helping cash flow but we are mainly a face to face qual agency and I think social distancing will stay with us till Xmas by which time we may well not exist!!"

"They have helped us maintain employment at a time when work has dropped off a cliff."

"It's been very helpful, in that we can pay furloughed staff. On the other hand - we're losing turnover and profit every single day - because we can't continue with some of the (mainly quantitative/face-to-face) projects."

### And less helpful...

"Our organisation falls in a gap between schemes. We are a limited business so get no small business relief and draw our income as dividends so receive no furlough support."

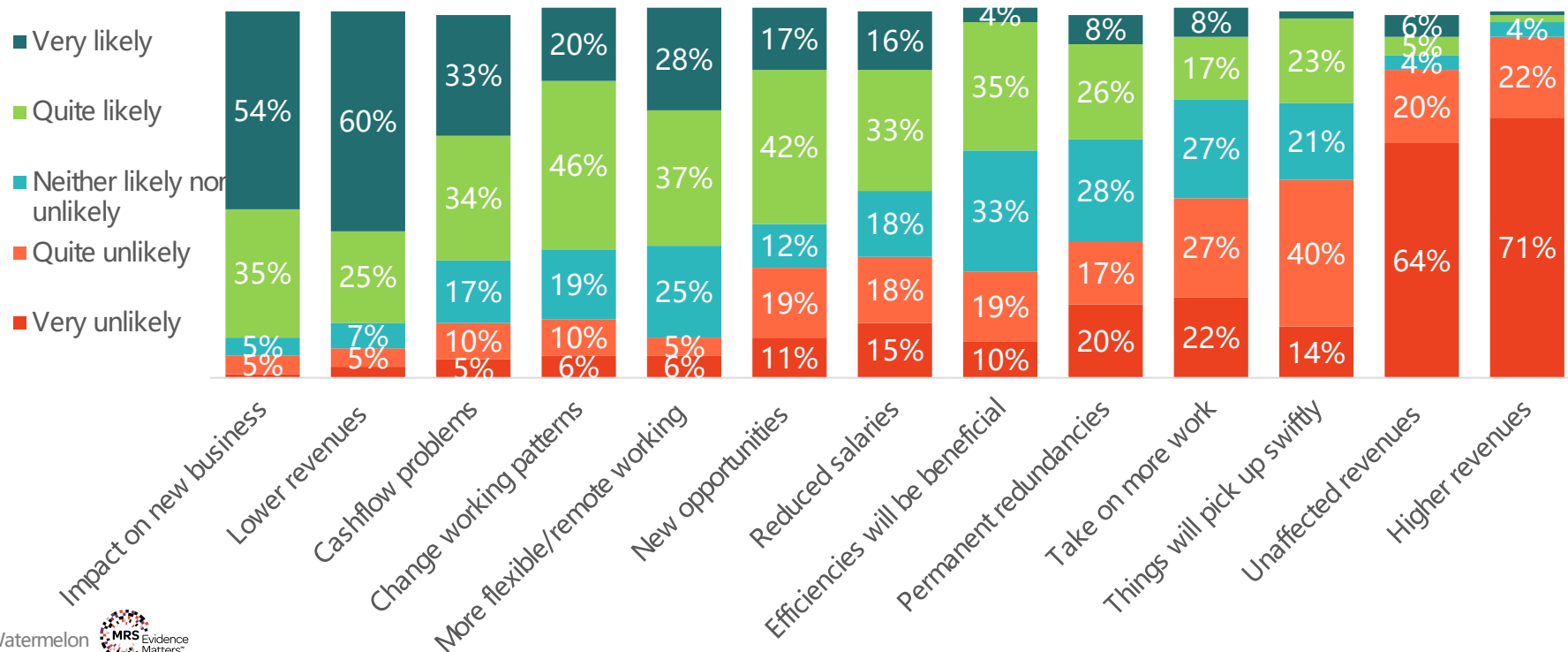
"The schemes do not specifically reference Market Research Viewing Facilities within hospitality, we have shut down completely because of social distancing."

"Because independent researchers who are directors of micro businesses can only claim a proportion of their PAYE contributions. Just not fair. We're not earning millions in dividends!"

# Most research & insight businesses believe they will be affected by reduced new business and lower revenues, followed by cashflow problems.

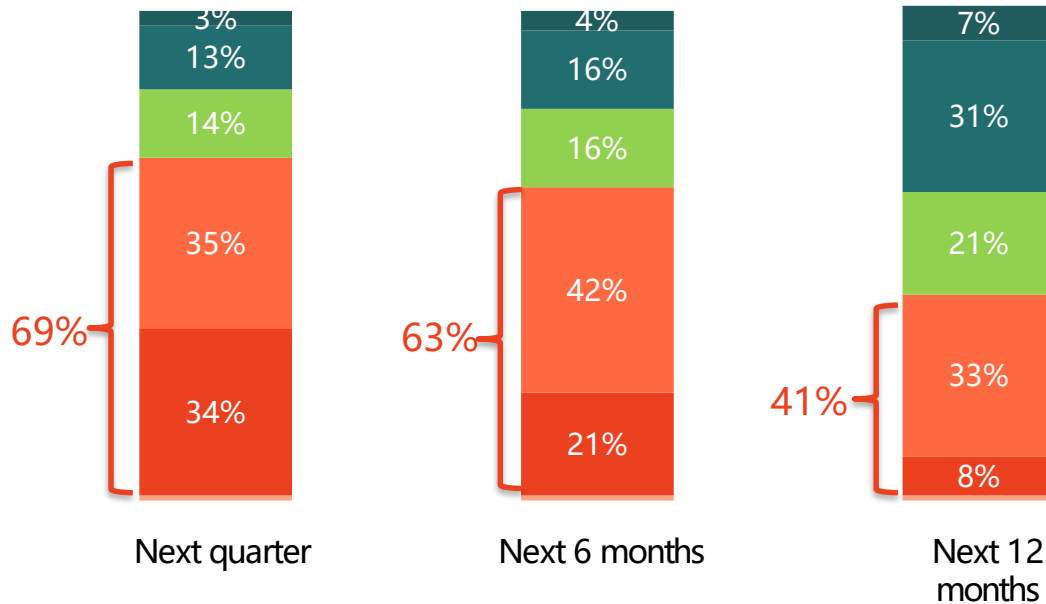
Many also anticipate changes in working patterns and an increase in more flexible and/or remote working.

How likely it is this will affect your business following the COVID 19 outbreak



Although few business leaders are very optimistic about the outlook, there is greater optimism as they look further into the future, although there are still only four in ten feeling optimistic about the next 12 months.

### Levels of optimism and pessimism looking ahead



Most pessimistic for next 6 months:

- Companies with 0-9 employees (72%)

Vs

- Companies with 10-49 employees (59%)

- Companies with 50+ employees (50%)

Very optimistic

Fairly optimistic

Neither pessimistic nor optimistic

Fairly pessimistic

Very pessimistic

Prefer not to say

Most pessimistic for next 12 months:

- Companies with 0-9 employees (53%)

Vs

- Companies with 10-49 employees (35%)

- Companies with 50+ employees (30%)



# 1

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## Standards and professionalism

- The Code of Conduct
- Membership
- Company Partner Accreditation
- Standards and Policy

# 2

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## A shared narrative

- Delphi reports
- Research Live
- Impact magazine
- Industry report

# 3

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## A diverse and inclusive future for talent

- Manifesto for Opportunity
- #MRS Pride
- Mental Wellbeing
- Training and qualifications



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## A diverse and inclusive future for talent

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- Manifesto for Opportunity
- #MRS Pride
- Wellbeing in the sector
- Training and qualifications





# How MRS is working with Government

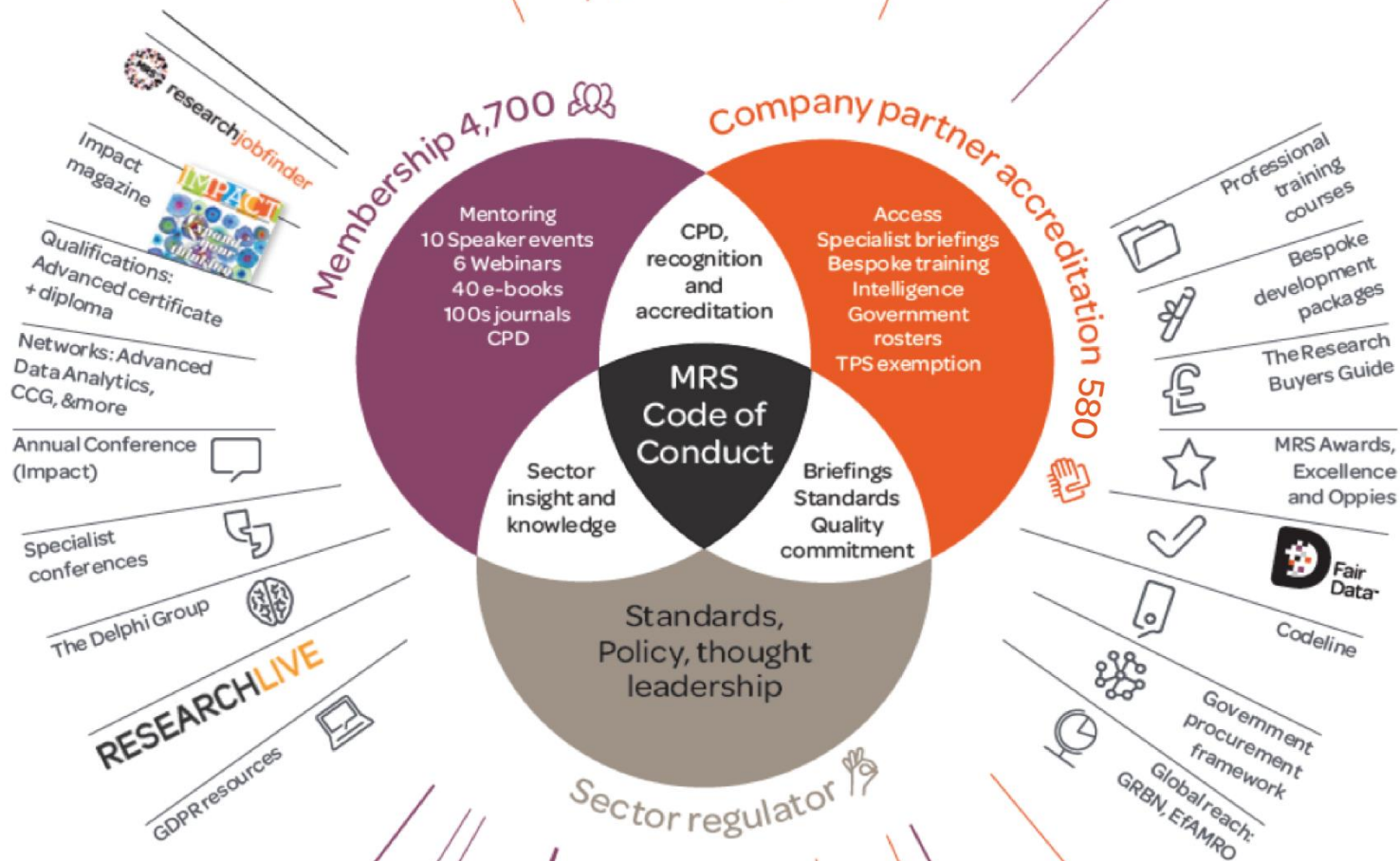
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**Debrah Harding**  
Managing Director, MRS



# MRS

## Overview



# MRS Public Affairs

## Message Tiers

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### Tier 1

#### Key policies



Jane Frost (JF) letters to the Chancellor, Cabinet Ministers, Shadow Cabinet, city Mayors, MPs

### Tier 2

#### Detailed policies



MRS Policy Unit daily liaison with senior departmental civil servants BEIS, DCMS, DIT, Cabinet Office and regulators e.g. ICO

### Tier 3

#### Co-ordinated sector policies



Policy Unit liaison with bodies such as the Advertising Association to ensure MRS detailed messages are being supported in sector lobbying

### Tier 4

#### Co-ordinated business policies



Jane Frost and Policy Unit liaison with business bodies e.g. FSB, CBI, other professional associations, to ensure MRS key policies are fed into wider business sector lobbying

# MRS Public Affairs

## Stage Activity

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### Stage 1



1. Protect research and insight
2. Support sector research to identify key issues
3. Set out key risks for research and need for recognition in government schemes
4. Issue Covid-19 research sector guidance

### Stage 2



1. Interpret government schemes
2. Communicate financial opportunities to research sector & MRS stakeholders
3. Lobby for improvements to schemes to benefit more MRS stakeholders

### Stage 3



1. Input into government 'Safe Working' guidance
2. Develop new sector guidance to complement government approach
3. Undertake research with stakeholders to assess impact & post-lockdown risks
4. Lobby for post-lockdown government support for research

# MRS Public Affairs

## Key Messages

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### **Practice of Research**

- Resumption of face to face data collection and research
- Government safe working guidance for different environments e.g. in-home, in-street, in-store, in-transit, in-venue; ensure guidance is suitable for environments used for research activities
- Government guidance on movement e.g. use of public transport
- Clarity on over 70s – researchers and participants
- Clarity on PPE
- Recognition of MRS guidance as the sector guidance for research

### **Research business**

- Extension of Coronavirus Job Retention Scheme (CJRS) to October with part-time workers grants
  - Recognition of dividends for small business within the Self-employment Income Support Scheme (SEISS)
  - More support for small business with the Coronavirus Business Interruption Loan Scheme (CBILS)
  - Expansion of Bounce Back Scheme to more than £50k
  - Rates relief for empty or largely empty research offices
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# Covid-19

## MRS Guidance



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### Context

- Issued in mid-May, updated in early June
- Enable some face to face data collection to resume
- Complements government advice on working safely during Covid-19

### Scope

- Extension of the MRS Code of Conduct
- ‘Must’ requirements are mandatory
- ‘Should’ requirements are recommended
- **Local guidance applies where research takes place – if all country projects must follow guidance applicable in England, Northern Ireland, Scotland and Wales**

### Structure

- Definitions linked to Covid-19
  - Requirements before commencement of face to face data collection including design and selection and use of practitioners
  - Face to face participant recruitment
  - During face to face research
  - In home/door-to-door face to face data collection
  - In-street/exit face to face data collection
  - In transit face to face data collection
  - In halls/venues
  - Additional guidance on mystery shopping also issued in early May
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# Covid-19

## MRS Guidance

### Definitions

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#### **Clinically extremely vulnerable individuals:**

individuals who have specific underlying health conditions that make them extremely vulnerable to severe illness if they contact Covid-19. See [government guidance](#) on who is defined as clinically extremely vulnerable and have been told by their GP or hospital clinician that they are extremely vulnerable and need to shield.

#### **Clinically vulnerable people:**

individuals who may be at increased risk from Covid-19, including those aged 70 or over, and those with some underlying health conditions. See [government guidance](#) on who is defined as clinically vulnerable.

#### **Research Practitioners:**

includes all individuals within the research supply-chain e.g. researchers, moderators, interviewers, recruiters, mystery shoppers, contractors, freelancers and temporary workers.

#### **The four nations guidance use different terms:**

In Northern Ireland and Wales tend to refer to the 'vulnerable' and 'extremely vulnerable' and in Scotland 'high risk' and 'extremely high risk'

# Covid-19

## England Guidance

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- |   |   |  |
|---|---|--|
| <ul style="list-style-type: none"><li>- Guidance changes on 4<sup>th</sup> July</li><li>- Pubs, restaurants and hairdressers to reopen</li><li>- Social distancing 2 metres, where not possible keep a distance of '1 metre plus'</li><li>- In England you can meet people you do not live with in 3 groups:<ul style="list-style-type: none"><li>- Outdoors up to 6 people from different households</li><li>- Single adult households exclusive support bubble with one other household</li><li>- From 4<sup>th</sup> July meet in group of 2 households (including your support bubble) in any location public, private, indoors or outdoors</li></ul></li></ul> | <ul style="list-style-type: none"><li>- It does not need to be the same household each time</li><li>- Indoors of no more than two household (incl. support bubble) this includes dining out and pubs</li><li>- Can gather slightly larger groups up to 30 for "major life events" such as weddings</li><li>- Not allowed to hold or attend events of any size if social distancing is difficult</li><li>- Members of your household or support bubble can stay overnight in groups of up to 2 households – including in each other's homes or other accommodation, such as hotels or apartments i.e. 'staycations' in England</li><li>- Some leisure and tourist facilities</li></ul> | <ul style="list-style-type: none"><li>- opening up – cinemas, museums, social clubs, community centres</li><li>- People can travel to meet people irrespective of distance (noting other country restrictions), but avoid using public transport wherever possible</li><li>- From 6<sup>th</sup> July those that are clinically extremely vulnerable that are single adults can form a support bubble</li><li>- The clinically vulnerable should continue to take care to minimise contact with others</li></ul> |
|---|---|--|
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# Covid-19

## MRS Guidance

### Before Research

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- Undertake a risk assessment of any proposed data collection exercise before beginning face to face data collection
- Government's safe working guidance must be followed for face to face data collection – e.g. other people's homes, shops and branches, outdoor working
- Risks must be discussed with clients and mitigations agreed
- A discussion must be undertaken with clients to determine whether face to face data collection is the most appropriate
- One of the considerations will be use of body coverings e.g. PPE, face coverings, gloves
- Liabilities for risks identified and actions taken must form part of the contract with clients
- Robust training of research practitioners on all the necessary requirements before undertaking any face to face data collection project



# Covid-19

## MRS Guidance

### Face to Face Practitioners

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- Research practitioners defined as clinically extremely vulnerable must not be used to undertake face to face data collection
- Research practitioners defined as clinically vulnerable should not be used to undertake face to face data collection
- If research practitioners within this group, specifically those who are 70 years or over, are fit and wish to work, they may be considered for face to face data collection
- Before any 70-year-olds or over research practitioners are used for face to face data collection a risk assessment must be undertaken
- The determination of whether to use 70-year-olds or over will depend on the outcome of any initial risk assessment
- Research practitioners within both groups who are fit and wish to work may also undertake other forms of data collection such as telephone or online data collection



# Covid-19 MRS Guidance

## Recruitment and General Face-to-Face Requirements

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- General rule about avoiding those who are visible unwell, standing two metres apart, use of sanitary wipes, tissues, etc
- Consider the appropriateness of face coverings and gloves
- Screener questions to determine Covid-19 risks including others in participants' households
- If a delay between recruitment and subsequent data collection research practitioners must repeat screener questions
- Only collect health data with informed consent
- Consider the format of any stimulus materials, showcards – risk assessment stage
- Can undertake face to face with those that are over 70 ('clinically vulnerable') if undertake risk assessment of the participant to ensure not high risk



# Covid-19

## MRS Guidance

### In home/Door-to-Door Requirements

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- Research practitioners must follow the government's working safely in other people's homes guidance
- Research participants must not enter people's homes
- Data collection must be undertaken on the doorstep, 2 metres apart
- Research practitioners must consider the environmental limitations of undertaking research on the doorstep e.g. lack of privacy, weather conditions, etc
- The environmental factors must be considered in the design of any data collection e.g. length, topic, use of support materials, use of self-completion tool, collection of sensitive or special category data etc



# Covid-19

## MRS Guidance

### In Street/Exit Requirements

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- Research practitioners must follow for example the government's retail sector guidance, guidance for retail, tourism and hospitality
- Data collection activities must take place outside of premises e.g. in high streets, outside retail premises, inside shopping centres but outside of premises
- Data collection activities must be with permission of owners of shops, centres and in adherence with any specific corporate guidance issued by shops or shopping centres
- Data collection must take place 2 metres apart from participants, consider use of cordoned areas



# Covid-19

## MRS Guidance

### In Transit Requirements



- Research practitioners must follow the government's travel guidance
- Data collection must be with permission of the transport owner and in adherence with any specific corporate guidance issued by the owners or managers of any transport used
- Data collection must take place 2 metres apart from participants
- Facial coverings must be worn



# Covid-19

## MRS Guidance

### In Hall/venue Requirements

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- Research practitioners must follow the government's guidance on businesses and venues which can and can not be used plus guidance regarding numbers and types of social gathering
  - Relevant risk assessment and safe working guidance for facilities: [Labs and Research Facilities](#)
  - Note that the guidance on venues and numbers differs between England, Wales, Scotland and Northern Ireland
  - Research practitioners must follow the guidance for the location where research is taking place
  - Venues used must be sufficient to meet 2 metre requirements or in England 1 metre plus with risk mitigations
  - If providing food and drink the government's working safely in restaurants offering takeaway and delivery guidance must be adhered to
  - Research practitioners must adhere with any specific corporate guidance issued by the owners or managers of any venues/halls used
  - Washroom facilities with hot water, soap, sanitising gel and disposable towels must be available
  - Posters must be visible setting out personal behaviour and hygiene requirements
  - PPE must be worn if this was worn prior to Covid-19 e.g. in food preparation
  - Follow other relevant guidance such as FSA on food hygiene, etc
  - New MRS guidance on using facilities for face to face data collection issued this week includes extra considerations about preparing facilities for re-opening
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# Covid-19

## MRS Guidance

### Face-to-face mystery shopping

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- Research practitioners must undertake risk assessments and agree mitigations
  - Consider the impact of contact tracking apps
  - Use of facial coverings and gloves – consider the mystery shopping approach being used, the environment (if public transport or public transport venues must wear facial coverings), whether social distancing is feasible, profile of those being researched, whether verbal communication is needed and its impact on the data being gathered
  - Before commencing mystery shopping
    - Environmental and circumstantial risks e.g. busy periods
    - Positions likely to ensure social distancing
    - Take steps to reduce risks where social distancing not possible
    - Consider changing environments e.g. if a bus is crowded, get off the bus and wait for a quieter bus
    - Avoid people who look unwell
    - Hygiene considerations
    - Avoid physical contact
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# Covid-19

## Support for the sector

### Membership



#### Membership

- Support individuals with extended membership from 12 to 15 months for those furloughed or with pay cut.
- Members get 30% discounts on training and events
- Free content in MyMRS – past webinars and more in the video library for members only

#### Company Partners

- Payment holidays for organisations under pressure
- Free memberships for key staff



# Covid-19

## Support for the sector

### Content

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#### Online content

- Webinars and Speaker Evenings recorded as webinars – The Power of Data on 9 July

#### Impact magazine

- Available in a new digital format alongside or instead of the printed issue

#### The new world of work

- Flex Forum blogs on the new world of work – how to set boundaries when working at home

#### Wellbeing

1. Why Wellbeing matters
2. How to manage your own stress
3. Why we need mindfulness in the workplace

#### Inclusion and diversity

1. The business case for inclusion
2. Get stakeholder buy-in for a diversity programme
3. Learning from Facebook's inclusion mistakes

#### Creativity and productivity

1. Creative success: nature or nurture?
2. Transforming fear into productivity and innovation
3. 13 creative hacks to boost productivity



# Covid-19

## Support for the sector

### Learning and development

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#### **We've moved online**

over 300 professionals over 205 courses  
delivered since lockdown with 35+ courses  
to come

- **Virtual Summer Academy**  
15 half day courses to help you navigate  
lockdown and the new world -
- **Virtual specialist conferences**  
Media, FMCG, Behavioural Science,  
Sustainability, Storytelling and Data  
Analytics



MRS SUMMER ACADEMY  
ONLINE

A new suite of half-day training courses designed to help market research professionals navigate the unprecedented landscape created by the COVID-19 pandemic.



MRS Evidence Matters



# MRS Roadshow 2020

## Your questions

