

# Face to face: returning to a 'new' world

What impact has the pandemic had, and what does the future hold?



# KANTAR PUBLIC



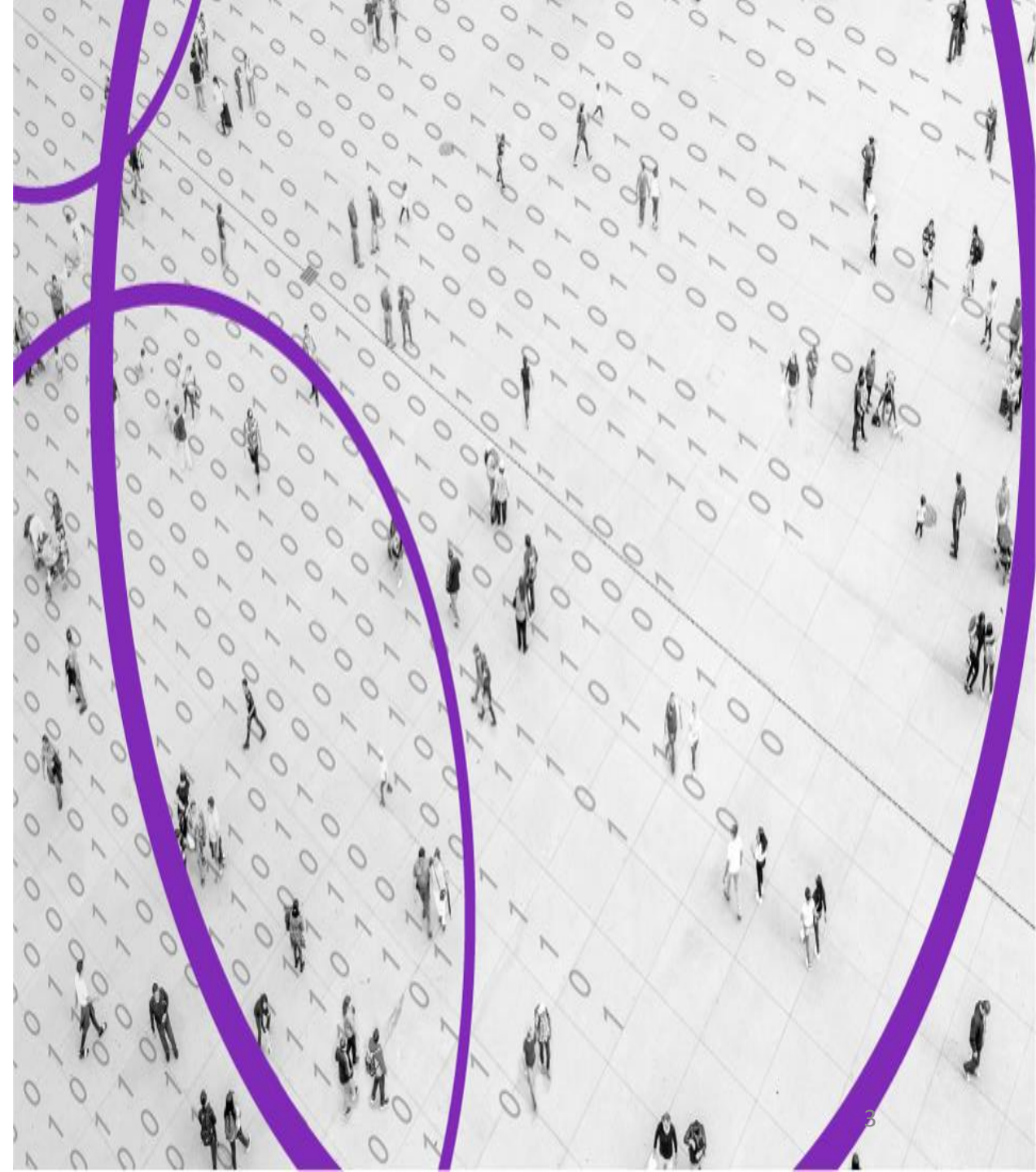
**NatCen**  
Social Research

## Agenda

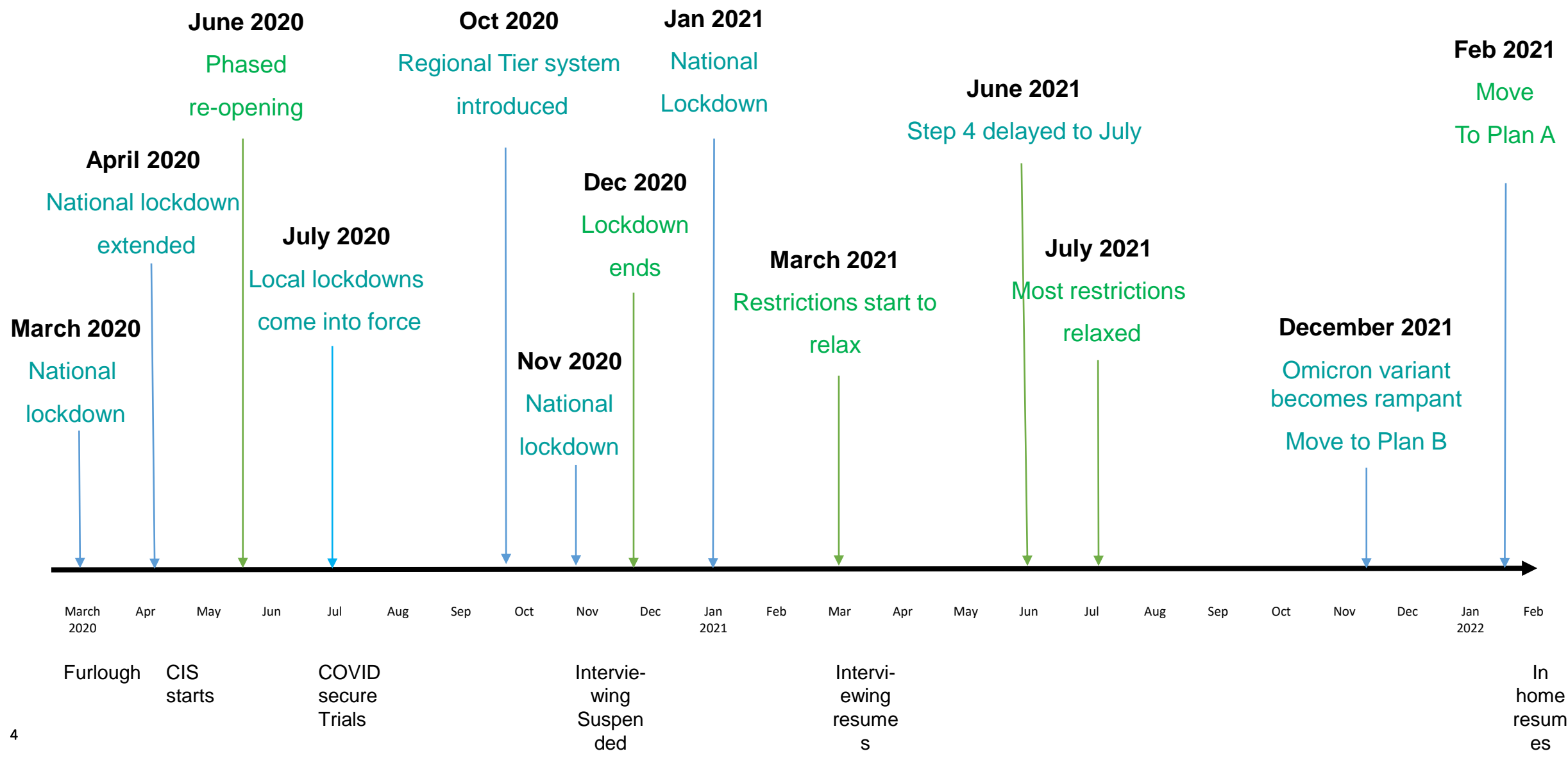
1. Introductions
2. Setting the scene
3. Current environment
4. Rising to the challenge

# Recap of the last 2+ years

- Face to face interviewing ceased in March 2020
- Stop/Start of interviewing across 2020/21/22
- Full return to in home in March 2022
- Increased public awareness of respiratory and hand hygiene
- Unknown impact of public perception of research
- Lack of in person contact with interviewers
- Digital innovation
- Flexibility of mode change (K2N, CATI, Mixed mode)



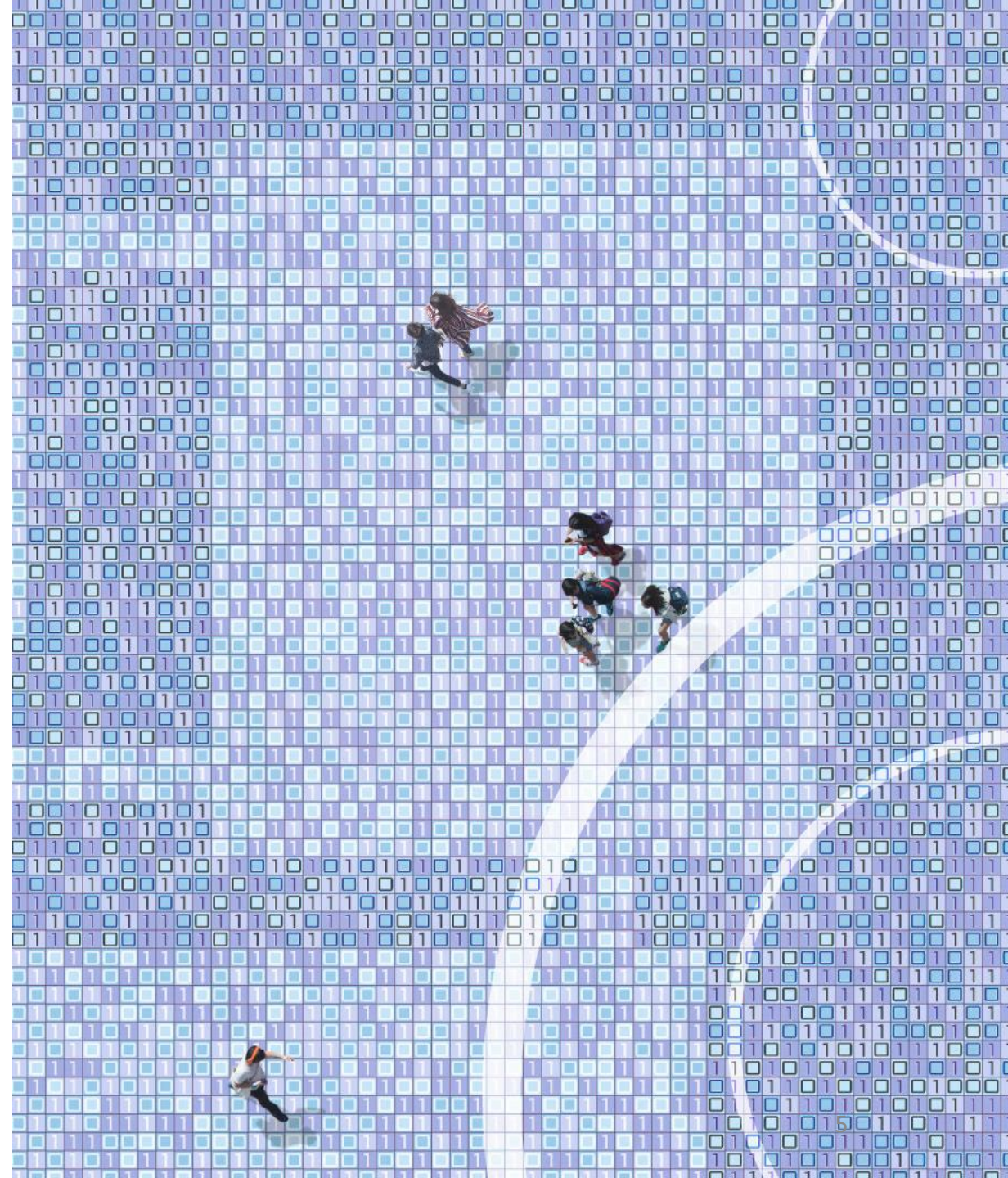
# COVID-19 journey – stops and starts





# The operational challenges

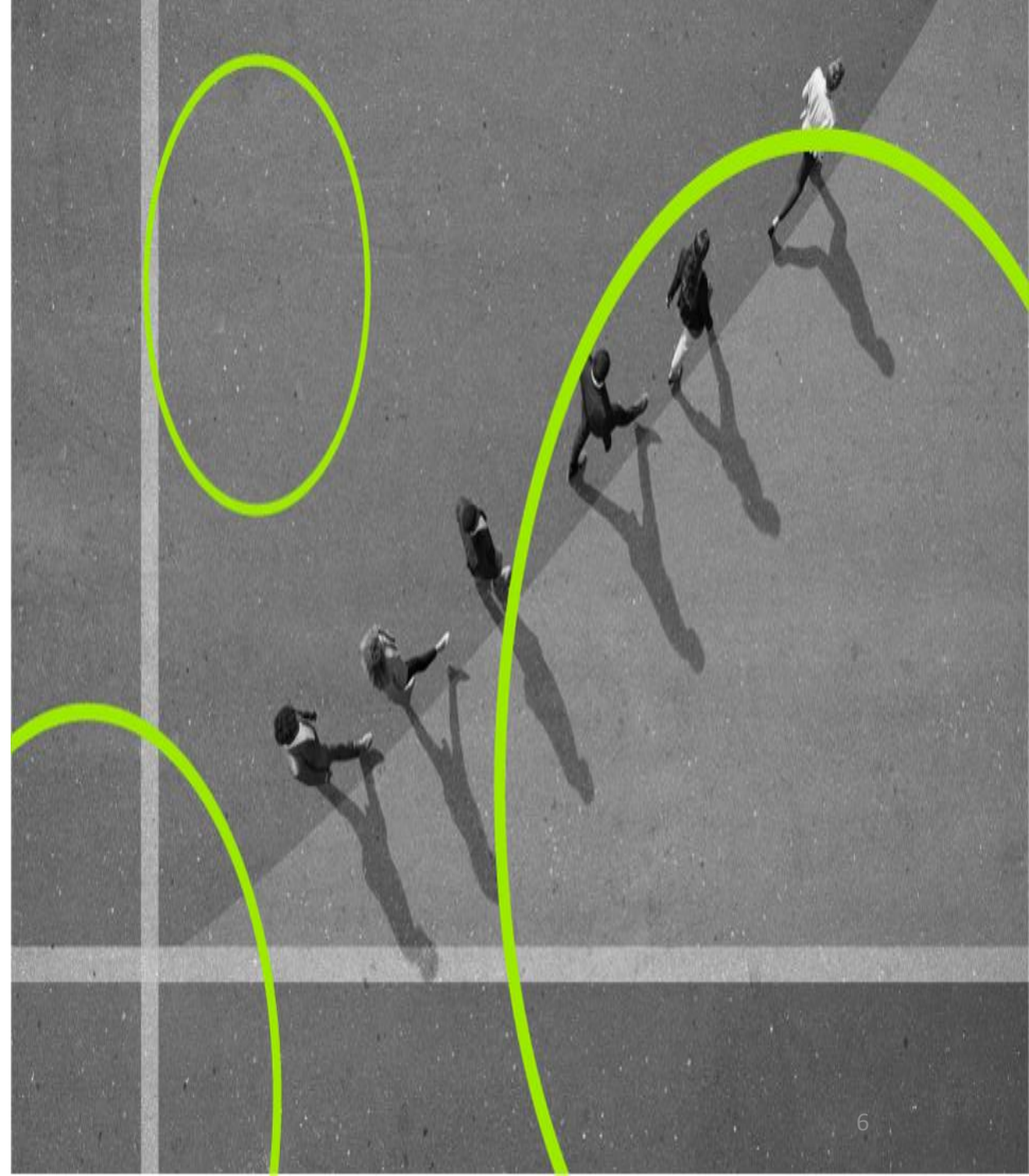
- Pandemic attrition – reduction in panel sizes
- Current levels of interviewer attrition – higher than pre pandemic
- Loss of experience & skill level
- Speed of remobilisation and growth required
- Attracting the right candidates in a competitive environment
- Volume of training & learning activity required – resourcing whilst delivering
- Upskilling our panel – volume of new interviewers





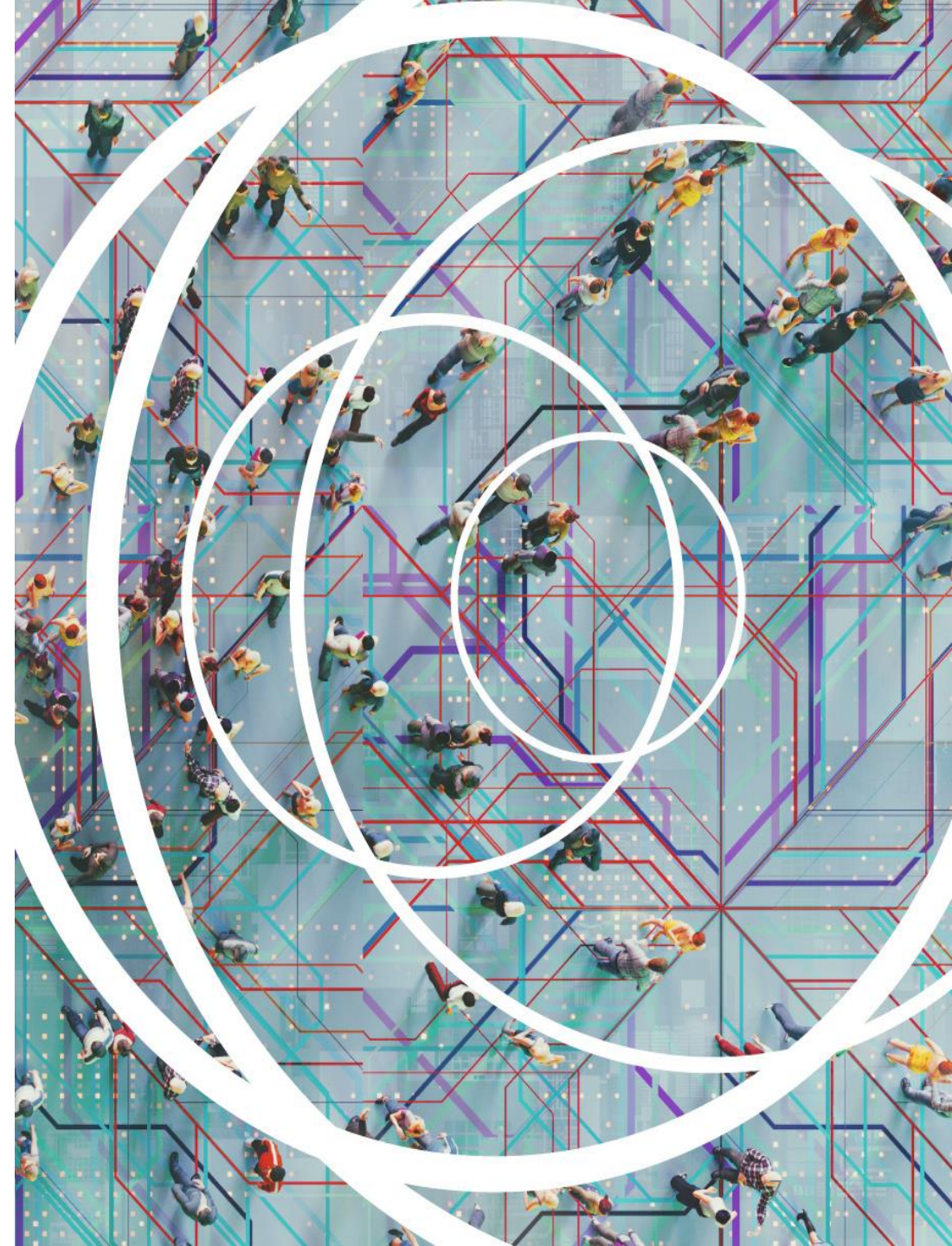
# The external factors

- Cost of living crisis – inflation at 10%
- Fuel prices – 17% increase since 1<sup>st</sup> April
- Increase in flexible positions in the job market – USP is no longer unique!
- Very low unemployment levels (June 22: 3.8%)
- Public sentiment & changes in lifestyle
- Uncertainty of engagement levels & response rates



# The value of in person research

- Improved recognition of value of surveys (CIS)
- Growing demand for face to face interviewing:
  - Hardest to reach
  - Seldom heard
  - Those disproportionately impacted by the pandemic
  - Sensitive topics
  - Complex households
- Complemented by mixed mode and alternative approaches – retain flexibility accelerated during the pandemic





# Our established interviewers

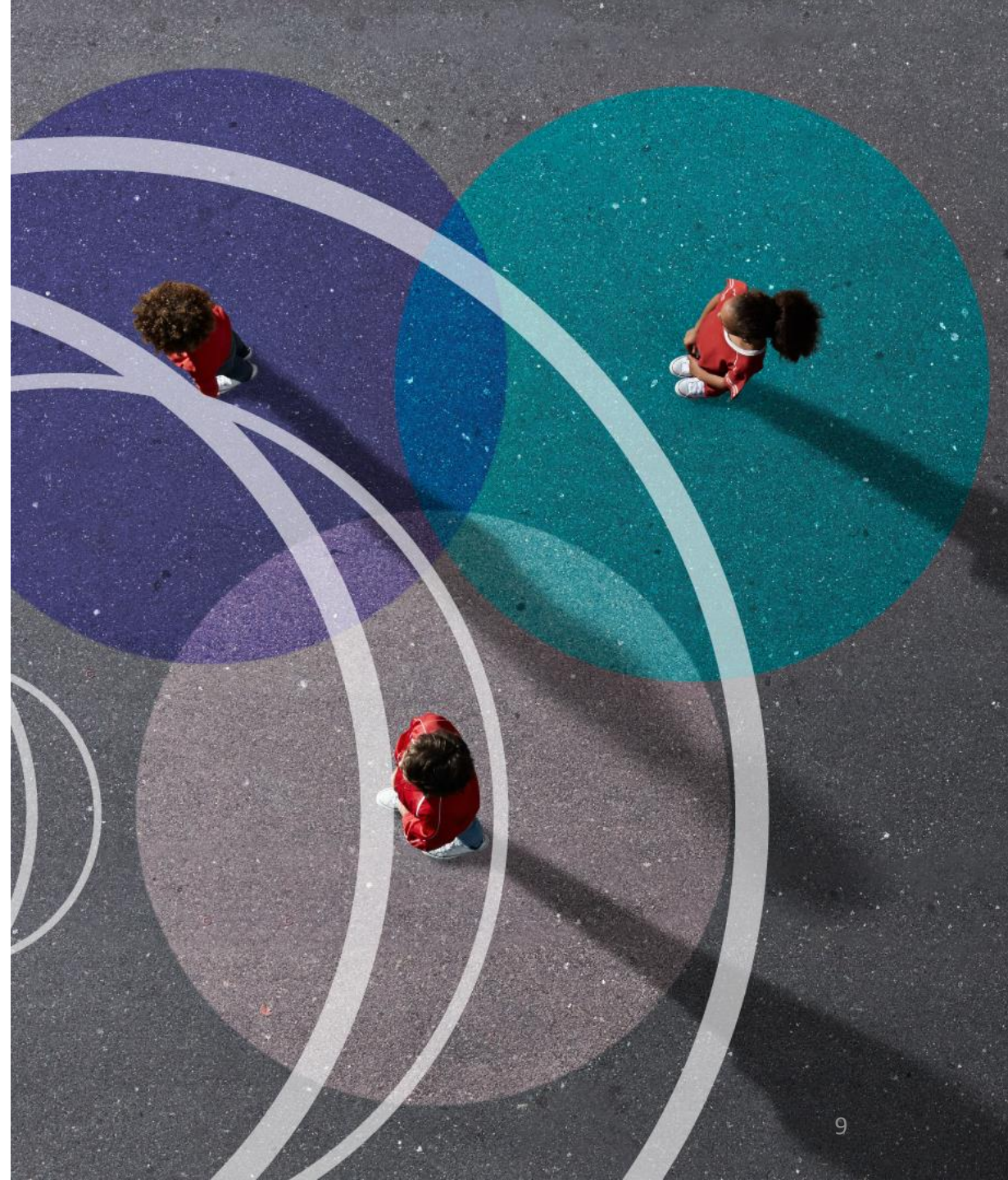
- Resilient and adaptable!
- Covid-19 safe interviewing protocols
- Impact on wellbeing of both interviewers and participants
- Loyalty to the industry
- Desire to return to interviewing
- A strong foundation for growth





# Opportunity at every corner

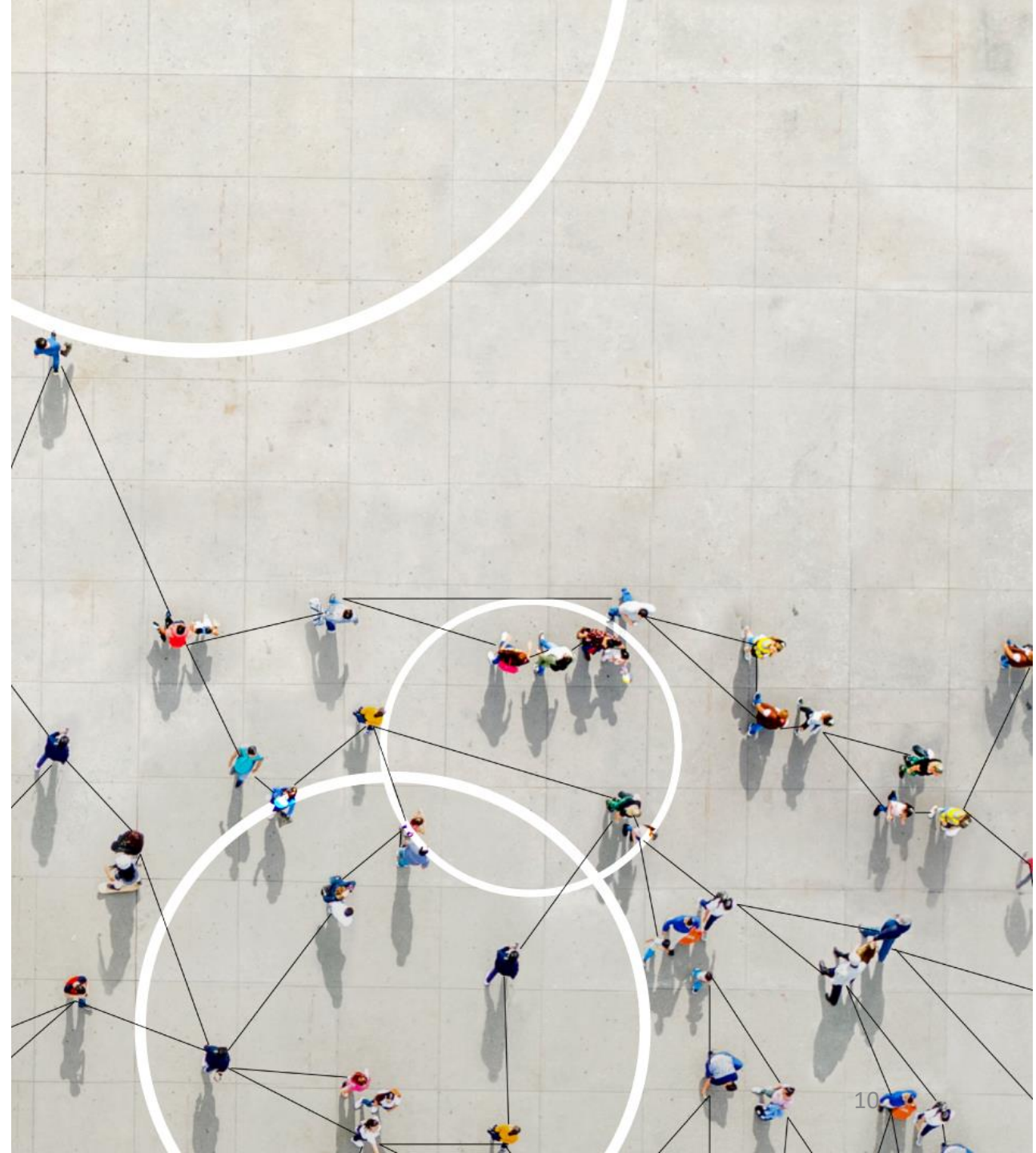
- Pandemic was a catalyst for change
- Using sequential mixed-mode approaches
- Retain flexibility in approaches – not lose what learnt over pandemic
- Accelerated innovation and tools changing how we work with participants and interviewers
- Building specialist panels
- Committed industry working groups & discussions
- Building a new future together – interviewers, agencies & clients





# Conclusion – bright but challenging future

- Still navigating the impact of the pandemic
- Managing the effort & cost of maintaining a skilled face to face panel
- The need to continue delivering in an unpredictable world
- New opportunities
- Innovation to manage time and cost
- Mixed-mode: matching method to information need, including in-home
- Exciting times!





# Thank You

