Opening the Conversation: Mental wellbeing in market research Australia

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Opinium

The Research Society

FOREWORDS

The Research Society is very proud to bring to our members, both individuals and company partners, the results of the Workplace Mental Wellbeing audit undertaken for us by global insight agency Opinium. We really hope you find these insights useful in managing your own mental wellbeing and that of the people you manage.

As we know only too well, this is a time when our lives, both personal and professional, are being completely upended. If uncertainty is one of the key predictors of mental stress, then we are truly being tested. The Research Society has been in close contact with many of our members over the past seven months and we know many of you are struggling. Trying to anticipate how the industry will be changed by the pandemic and what changes we should be making to accommodate these shifts is I'm sure, playing on all our minds. It is therefore particularly timely for us to provide some insight into how our workforce is faring, and how its mental wellbeing compares to other sectors across the Australian workforce.

The data does show that the very nature of the research business, dealing with complex problems, with tight deadlines and demanding clients, places a lot of stress on our workforce. 84% report having felt stressed, anxious, down and/or burnt out in the past 12 months, compared to 73% of the general workforce.

But perhaps because of the stressful nature of the work, our workplaces are shown to be somewhat more open about mental wellbeing, more inclined to offer flexible work hours and to have initiatives in place to help people stay mentally well. 3 in 4 say their workplace takes mental wellbeing seriously, and 3 in 5 feeling they could talk to their manager about their mental health if they wanted to.

The data is of course pointing to areas we as an industry can improve, including talking openly about these issues with staff, and making sure everyone feels they can talk about mental health struggles at work and know they will be listened to with respect. The report points to the critical importance of taking a lead from workers themselves, asking them what they need to feel supported and listening to what they say. The report also provides some interesting insights into how this pandemic might alter our work practices in the longer term. If 99% of the market research workforce says it wants to continue to work from home in some way, many of our business are facing fundamental change and now is the time to be thinking about how we might best adapt.

Do have a careful look at the report. It has a lot to show us about where we are doing well, where we can do better, and what the future might look like once we get through the current turmoil.

Dr Vicki Arbes – President, The Research Society

There has never been a more crucial time to talk about mental health at work.

The extra stress and strain that Covid-19 has placed on the mental health of the world is something that none of us could have predicted. It has turned our worlds upside down in terms of working practises and day-to-day living, and this has undeniably impacted mental wellbeing.

After developing the first workplace mental wellbeing audit with Warwick University Medical School in 2019, we were so delighted when the Research Society agreed to partner with us and help us take the audit further afield in its second year.

Our research has found that the majority of market researchers in Australia have struggled with their mental health to varying degrees in the last 12 months. Though despite this impacting so many of us, the culture around talking about mental health problems in the workplace still needs considerable work. Employers have a vital role to play in supporting the mental health of their teams and fostering a culture of openness and acceptance.

We are extremely proud to be able to share this report with you, which we hope will accelerate change in market research teams across Australia. As you'll see throughout the report, we've uncovered some of the key issues companies need to address, and various initiatives that may help them in doing so, as well as the impact of Covid-19 on mental wellbeing. We all have mental wellbeing, and by employers taking that first step in the right direction it will kick start wider organisational change, benefitting everyone involved.

Sophie Holland – Senior Researcher, Opinium

BACKGROUND TO THE STUDY

Opening the Conversation: Mental wellbeing in market research Australia 2020

Much progress has been made in the area of mental health in the last several years; talking about it openly and honestly has become more commonplace, and governments and businesses have recognised that they have a major role to play in helping people look after their mental wellbeing.

We designed our Workplace Mental Wellbeing Audit to help businesses and other organizations understand the mental health of their employees and in turn take steps to help them. This year we have expanded our study to include the Australian research industry, an initiative that was made all the more urgent and timely by the outbreak of the coronavirus and the subsequent upheaval of our daily lives.

A combination of being isolated from friends and family, a major economic downturn, and of course the threat to our physical health, create an environment that is far from conducive to good mental wellbeing.

For this study we partnered with the Research Society and surveyed 180 Australian research professionals, to understand specifically the mental wellbeing of those working in the research industry and the impact of coronavirus on Australian researchers.

Throughout the report, we also compare to our normative database of national Australian workers, to understand how the research industry fares in comparison to other sectors. Huge thanks to TEG Insights for generously providing us with the sample for this vital element of the report.

The Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS)

A key element of our audit is the Warwick-Edinburgh Mental Wellbeing Scale; a rigorous and scientific method designed by the University of Warwick with funding from NHS Health Scotland. Not only does the scale give our research a robust method for measuring mental wellbeing it also distinguishes our approach from the myriad of other mental health surveys by giving us a benchmark to work with that is underpinned by academic research.

Looking at the scores of the scale, the mental wellbeing of an individual can be determined in terms of whether it falls above or below the national average. The scale enables us to quantify mental wellbeing, thus promoting wider understanding of mental wellbeing as a whole. A further use of the scale is to encourage effective improvement of mental wellbeing for the individual, by tracking scores over time, and to equip organisations and wider society to support the enhancement of mental wellbeing.

*Warwick–Edinburgh Mental Wellbeing Scale (WEMWBS) © University of Warwick, NHS Health Scotland and University of Edinburgh, 2007, all rights reserved. If you would like to use the scale, please visit the University of Warwick website for more details: https://warwick.ac.uk/fac/sci/med/research/platform/wemwbs/

SUMMARY OF FINDINGS

Recommendations

The research provided us with a wealth of data to analyse and deciding which findings to focus on was no easy task, but in summary we found three important recommendations for employers in the market research industry:

1. Open up to overcome stigmas

Whilst positively the research has highlighted that Australian researchers who have experienced a mental health problem in the last year are better at speaking up about this at work than Australian workers in general, a significant number chose not to talk about this. Looking into the reasons behind this, a significant proportion did not feel it was appropriate to discuss this at work or were embarrassed by their mental health struggles.

2. Promote existing initiatives and introduce new ones

Many employers offer mental wellbeing initiatives to employees, the challenge now comes with ensuring employees understand how to access these initiatives and feel comfortable using them. There are also a number of initiatives that show demonstrable impacts on mental wellbeing, such as flexible working hours and having dedicated spaces to take breaks, employers should prioritise the introduction of these if they are not already in place. Employers should also listen to employees when it comes to supporting mental wellbeing, as there are several initiatives that there is employee demand for but are only being offered by a handful of employers.

3. Learn from the lockdown

A key part of the research showed that the working from home aspect of the lockdown provided a number of benefits for employees; they feel more relaxed and have a better work life balance. That said, the picture was not all perfect and not everything about lockdown was easy. For employers we recommend learning how to make some of these changes to working patterns permanent; greater flexibility, trust in your staff, and so on.

KEY FINDINGS

84% of Australian researchers have experienced a mental health problem in the last year, compared to **73%** of Australian workers

58% of Australian researchers who struggled with their mental health told someone at work about it

87% of those who experienced a mental health problem said this had a negative impact on their work

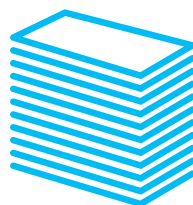Despite this just **24%** took time off work to recover from this

53% stated they had too much to do at work to take time off

52% say that having too much work to do was the main cause of stress

40% say working from home during the pandemic has increased their mental well-being

76% feel they would be supported at work if they were struggling with their mental health

99% want working from home practices to continue in some way after the lockdown

1. OPEN UP TO OVERCOME STIGMAS

Given the rollercoaster of a year we have had, it is understandable to see that mental health has taken a hit. Whilst positively we are seeing that Australian researchers are better at speaking up about their struggles with their mental health compared to the national picture, the research industry still has work to do to overcome stigmas that still exist within the industry with regards to mental wellbeing.

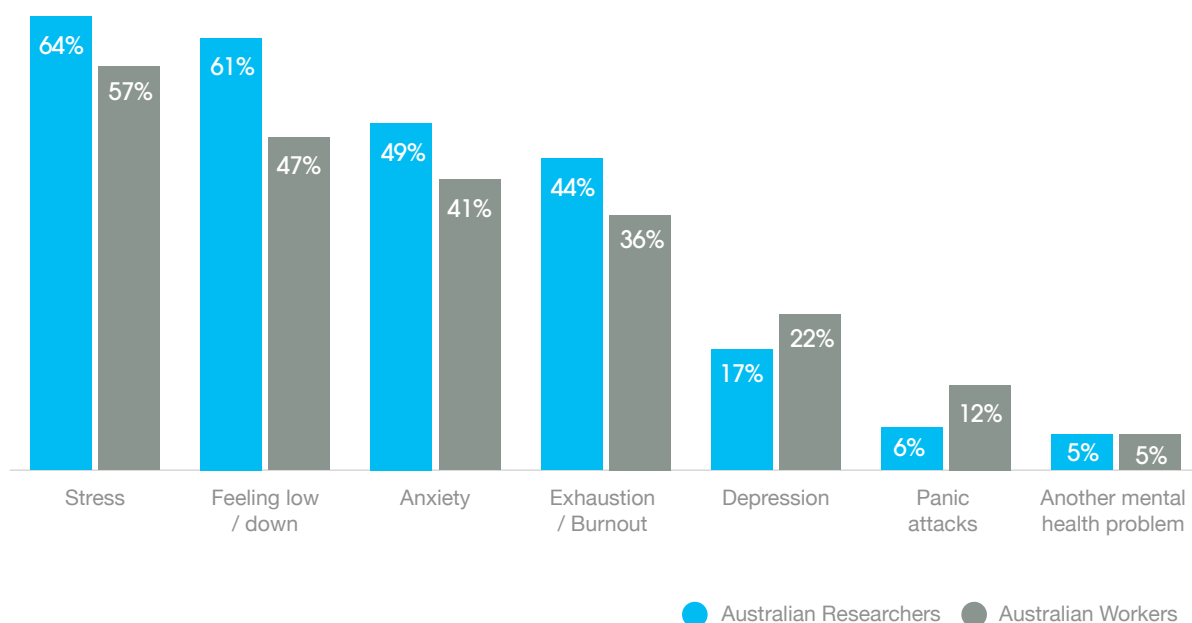## Struggles with mental wellbeing are common amongst the research community

Looking at the WEMWBS scores for Australian researchers, we see these are slightly higher than the benchmark of Australian workers, with researchers scoring 49 on average and workers in general scoring 47.

Thinking about health issues in the last 12 months, Australian researchers are likely to have experienced a mental health problem compared to workers in general, with more than four in five (84%) Australian researchers experiencing some form of mental health problem compared to 73% of workers overall.

Australian workers have experienced stress, feeling low / down, anxiety and burnout more frequently than Australian workers, although have experienced depression and panic attacks less frequently.
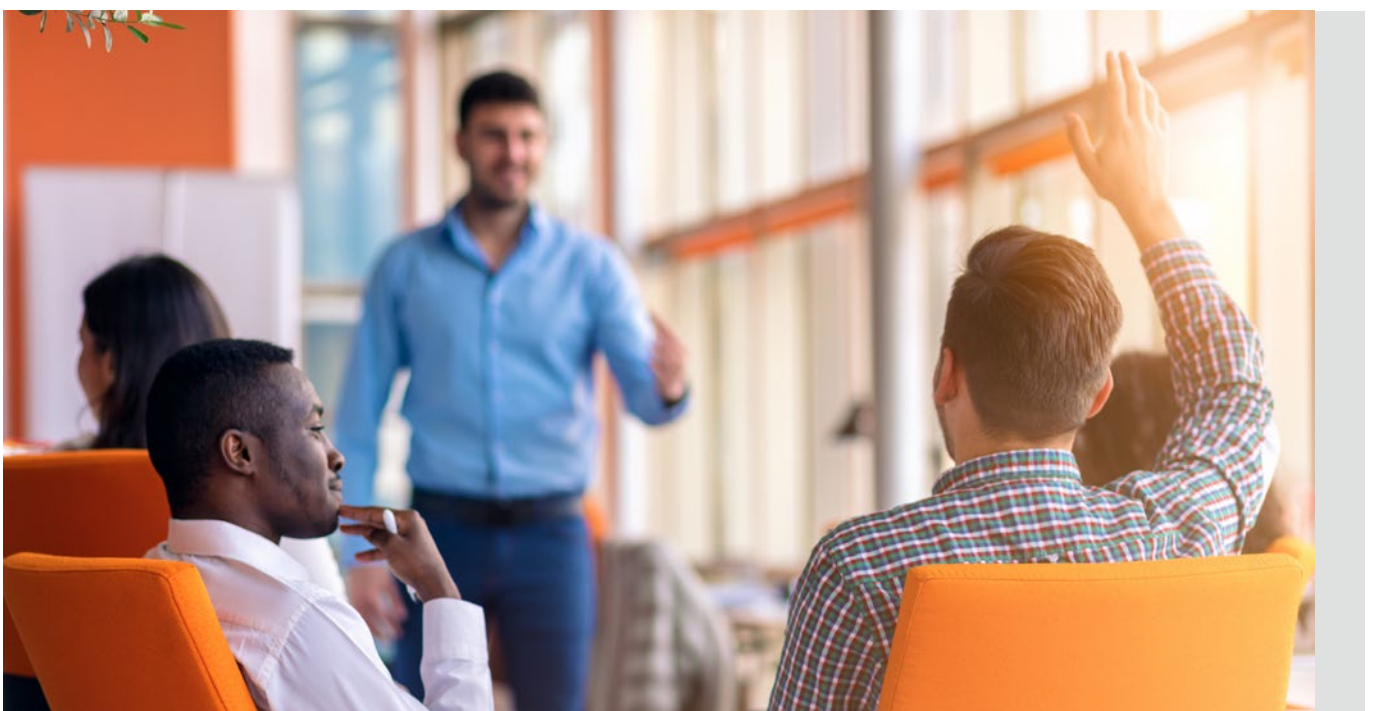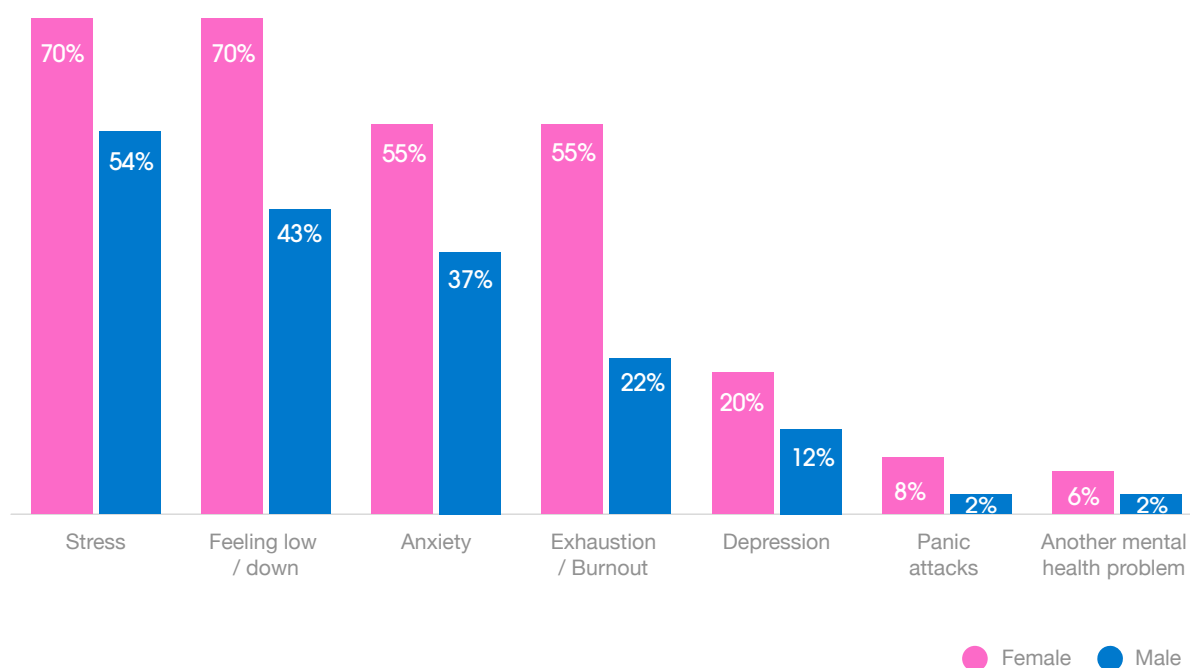
Differences in mental health problems experienced in the last 12 months among researchers and general workers

	Stress	Feeling low / down	Anxiety	Exhaustion / Burnout	Depression	Panic attacks	Another mental health problem
Australian Researchers	64%	61%	49%	44%	17%	6%	5%
Australian Workers	57%	47%	41%	36%	22%	12%	5%

● Australian Researchers ● Australian Workers

Within the research industry itself, women are more likely to have experienced mental health problems in the last 12 months compared to men (90% vs 74%).

Differences in mental health problems experienced in the last 12 months among female and male researchers

	Stress	Feeling low / down	Anxiety	Exhaustion / Burnout	Depression	Panic attacks	Another mental health problem
Female	70%	70%	55%	55%	20%	8%	6%
Male	54%	43%	37%	22%	12%	2%	2%

● Female ● Male

However, few are taking time off for their mental health

Among researchers who have experienced a mental health problem in the last 12 months, just a quarter (24%) took time off to rest or recover, compared to half (51%) who took time off for a physical health problem.

This is also less than our benchmark, whereby a third (32%) of Australian workers took time off work for the mental health problem in the last 12 months, compared to 24% of researchers.

But what are the reasons for this?

Although the top reason for not taking time out was due to feeling it was not bad enough to need a day off (63%), over half (53%) stated they had too much to do at work to take time off for this, and over a third (38%) just wanted to keep it to themselves. Meanwhile, a quarter (24%) didn't think it was a valid reason to take time off and a similar proportion didn't want to ask for the time off (23%).
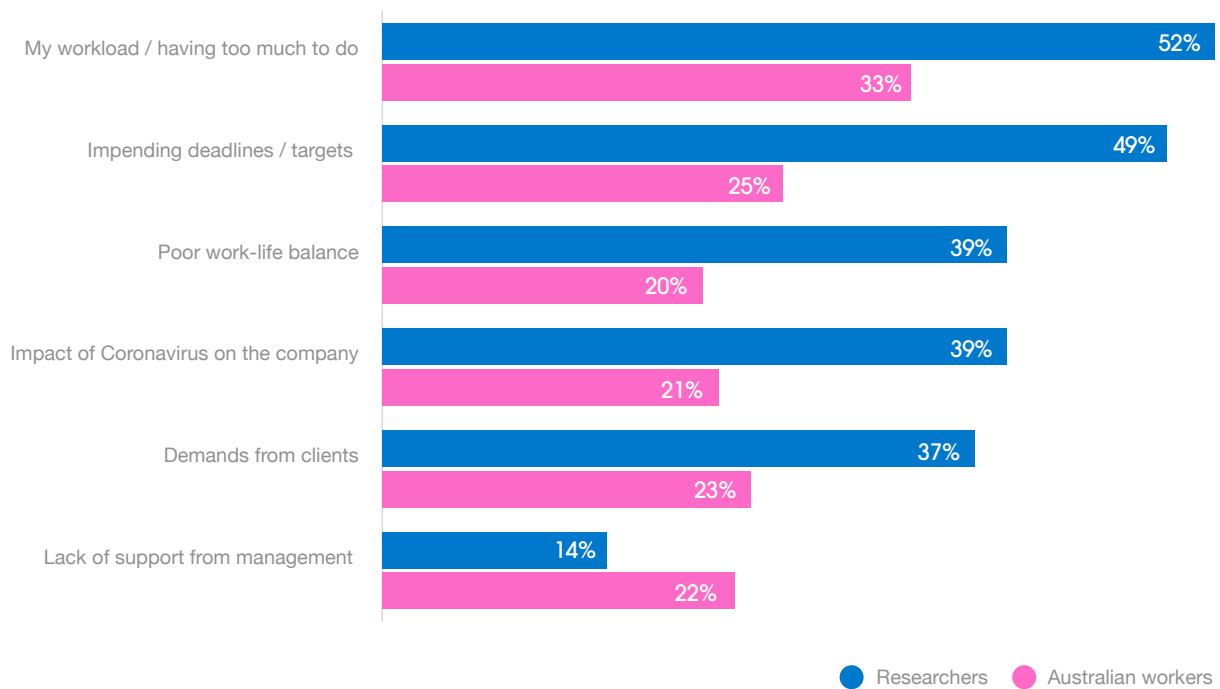
The research world can be a stressful environment

When it comes to stress at work, the research world has its fair share of stress. Most stress comes from workload and having too much to do (52%), followed by impending deadlines and targets (49%) and having a poor work-life balance (39%). The pandemic has also had an impact on stress with a similar proportion (39%) saying the impact of Coronavirus on their company causes them stress. Clients can also be a source of stress, with 37% stressed by client demands. With this in mind, a fifth (18%) of researchers say they find their job highly stressful, which is on par with workers in general (18%).

Whilst Australian workers experience the same stressors, this is to a lesser extent than what researchers experience. Interestingly, workers overall are more likely to say that they experience stress due to lack of support from management, whilst positively this is less of a stressor for researchers.

What causes you to feel stressed at work?

Cause	Researchers	Australian workers
My workload / having too much to do	52%	33%
Impending deadlines / targets	49%	25%
Poor work-life balance	39%	20%
Impact of Coronavirus on the company	39%	21%
Demands from clients	37%	23%
Lack of support from management	14%	22%

● Researchers ● Australian workers

Researchers feel positively about attitudes towards mental wellbeing in the workplace

Turning now to attitudes towards mental well-being in the workplace, reassuringly researchers feel positively about this, with 81% feeling that their colleagues would be supportive if they were struggling with their mental health and well-being and three quarters (76%) feeling they would be supported at work if they were struggling with their mental health.

In addition to this, three in four (72%) feel their current workplace takes the mental health and wellbeing of employees seriously and almost three in five (58%) feel they can talk openly about their mental health with their manager.

These feelings are greater than what is felt among workers in general, with just 56% of workers overall feeling they would be supported at work if they had an issue, and just 53% feeling that their current workplace takes the mental wellbeing of its employees seriously.

Despite this there are still barriers to speaking up about mental health problems at work
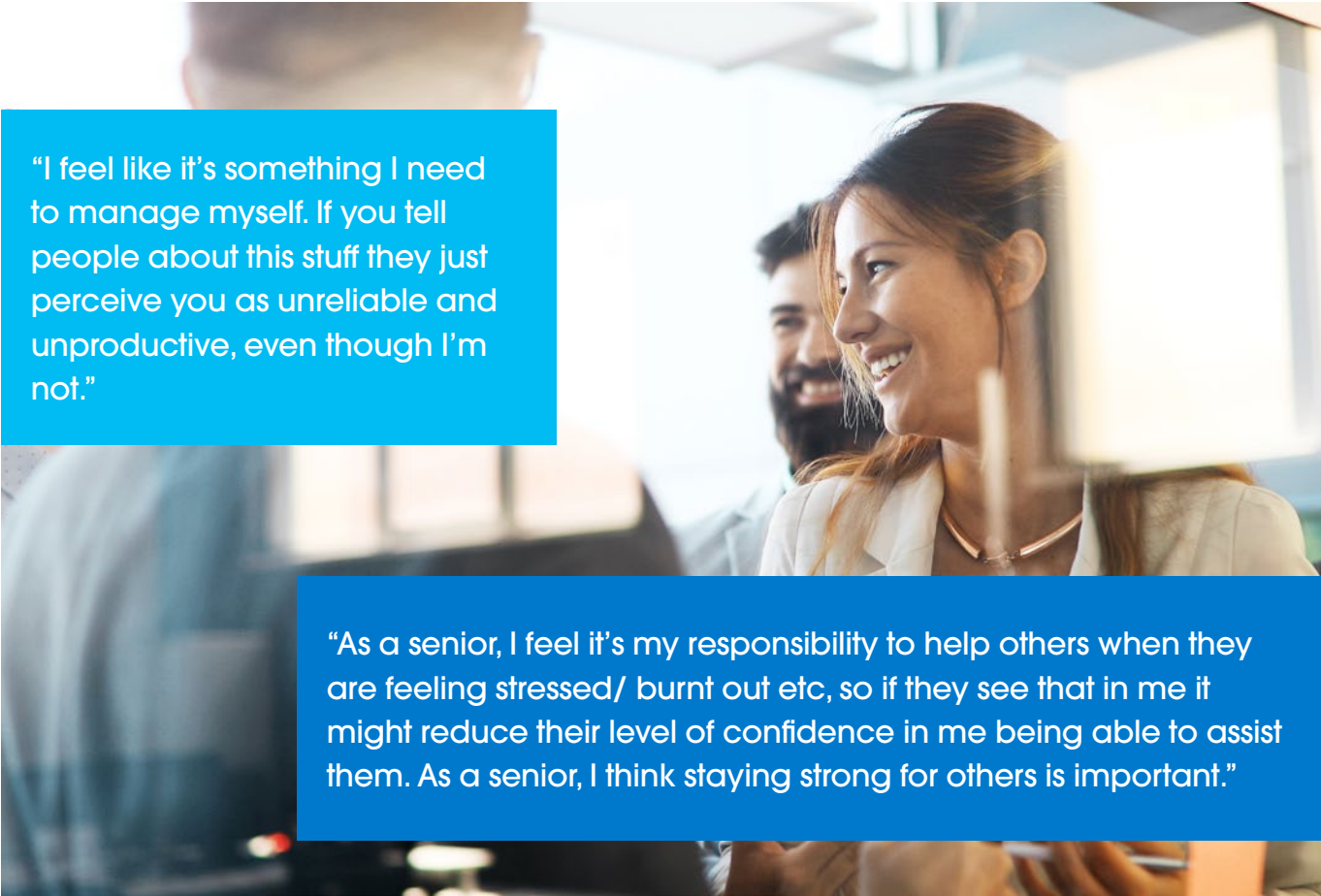
Among those who have experienced a mental health problem in the past 12 months, two in five (39%) did not tell anyone at their current workplace about this (vs. 53% of workers overall).

Why was this?

Two in three (65%) said this was because they didn't feel it was necessary to tell them:

> "Because it is a high-pressure environment and there is an expectation that you put in when times are busy. I feel the pressure to step up and perform at that next level, uncertainty in my own abilities can add to the pressure. I talk to my partner about how I feel - not people in my workplace"

Over a quarter (27%) didn't think it was appropriate to discuss their mental health at work and a similar proportion (27%) were embarrassed. Meanwhile, 24% didn't think they would be able to help.

> "I feel like it's something I need to manage myself. If you tell people about this stuff they just perceive you as unreliable and unproductive, even though I'm not."

> "As a senior, I feel it's my responsibility to help others when they are feeling stressed/ burnt out etc, so if they see that in me it might reduce their level of confidence in me being able to assist them. As a senior, I think staying strong for others is important."

Although those who did speak up generally had positive experiences, some felt support was lacking

Positively, the majority (58%) of Australian researchers who experienced a mental health problem in the last 12 months told someone at work about this, with this greater than for Australian workers (43%). Most researchers reached out to another colleague (48%), followed by a line manager (45%) and a quarter (25%) told the CEO.

Thinking about their experiences when speaking up about their mental health problems at work, the majority (79%) said the person they told was understanding and supportive, with 22% being offered compassionate leave if things got too much.

"This is a colleague, a friend, I've worked with for years. I told her I had decided to see a therapist and she was quite encouraging. Depression is very common, I don't feel embarrassed about it, I just choose to talk about it with people I know and trust."

"I shared with my manager that I was getting separated and moving out of the family home and having to juggle the new job with my children's needs. She was understanding and supportive in terms of giving me space to talk about it and encouraging me to look after myself in terms of work/life balance ie working from home, leaving early if required."

However, some experiences could have been better, with a fifth (19%) feeling that although the people they told were sympathetic they didn't know how best to support them, and one in ten (8%) felt they didn't take it as seriously as they should have.

The response I received after disclosing my struggles with burnout and stress varied - my internal mentor was supportive, wanted to understand how I felt and what would be helpful in addressing the situation, and also strongly encouraged (almost insisted) that I take some sick leave.

The response I received from others in the organisation (execs, my boss, HR) can best be described as superficial - they made all the right noises and talked about support and care, but did not take any actions to address the circumstances in the workplace which were the cause of my issues - circumstances that have been well documented over time.

I was advised to meditate, to breathe, given a lot of (not very helpful) advice about nutrition and sleep hygiene, and directed to our corporate Employee Assistance Program where I can get one session with a counsellor. In short - all talk, no meaningful action.

Whilst it is positive that issues like mental health are perceived to be taken seriously by the research industry, there is evidence to suggest that speaking up about mental health is still stigmatised to some extent. Ensuring employees feel safe to open up about their mental health and taking actions to address the impact work could be having on wellbeing is an important step for employers to take in improving mental wellbeing.

2. PROMOTE EXISTING INITIATIVES AND INTRODUCE NEW ONES

Many employees are offered mental wellbeing initiatives by their employer (93%), which is great to see! The challenge now comes with ensuring employees understand how to access these initiatives and feel comfortable using them. There are some initiatives that show demonstrable impacts on mental wellbeing, and employees are asking for additional initiatives to be introduced. Based on this, we have several recommendations to employers:

Introduce initiatives that positively impact mental wellbeing. There are specific initiatives, such flexible working and having dedicated space to take breaks, that have demonstrable effects on mental wellbeing, employers who do not already offer these should prioritise introducing them.

Ensure that employees understand how to access initiatives and also promote the usage of these, giving reassurance to employees about using these initiatives will boost usage and ultimately employee mental wellbeing. This is especially the case for employee assistance programmes and information about mental wellbeing techniques.

Listen to employees when it comes to the wellbeing initiatives that will be most useful to them. Hearing this feedback directly from employees will enable employers to identify new initiatives that will boost employee mental wellbeing.
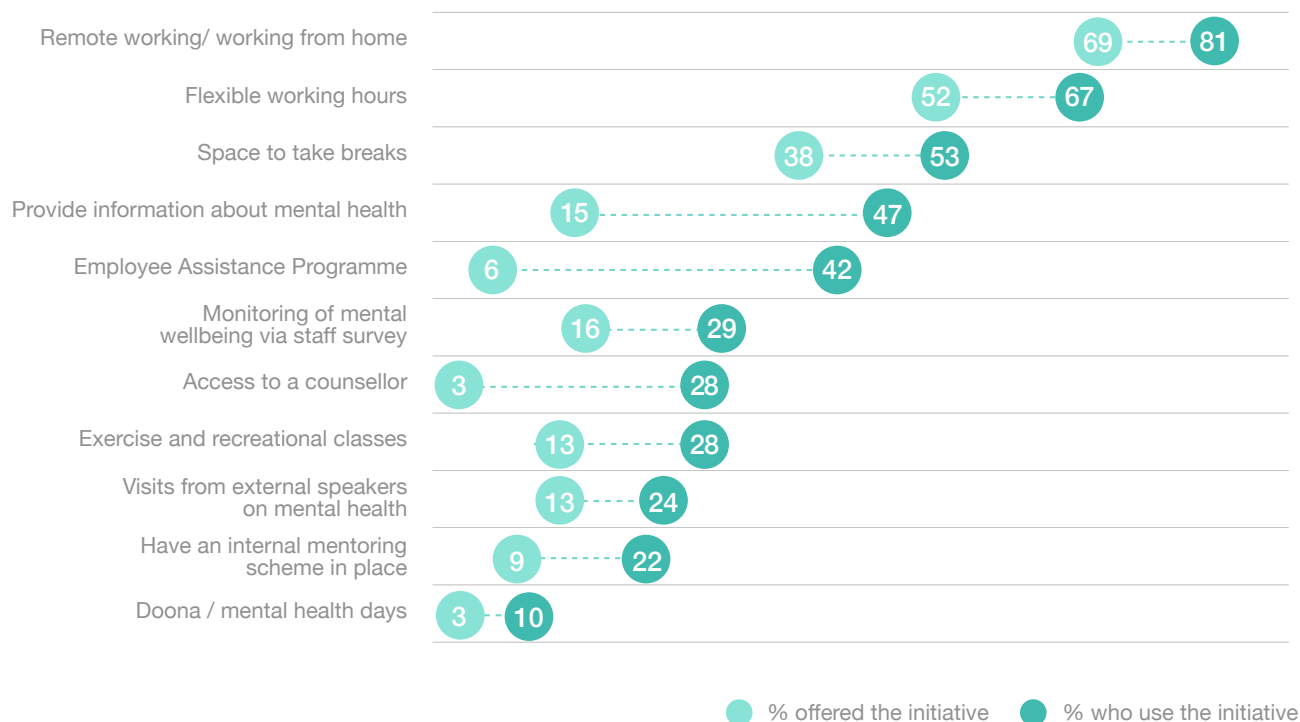
Foster a culture where mental health is spoken about openly and encourage regular check ins. It is important that employers embed mental wellbeing into the workplace culture, otherwise initiatives will not get used.

Initiatives that are working

Researchers are offered a range of initiatives to support their mental wellbeing. Two thirds (81%) of are offered remote working (vs. 32% of Australian workers overall), 67% are offered flexible working hours (vs. 31% of Australian workers) and 53% have a dedicated space to take breaks (vs. 37% of Australian workers).

However, usage is low amongst a number of these initiatives, as shown in the chart below. Whilst 42% of researchers have access to an employee assistance programme at their company, only 6% have used it. The same is true of information about mental health and techniques to improve wellbeing, 42% are offered this, but only 15% have used it.

Initiatives offered

Initiative	% offered the initiative	% who use the initiative
Remote working/ working from home	69	81
Flexible working hours	52	67
Space to take breaks	38	53
Provide information about mental health	15	47
Employee Assistance Programme	6	42
Monitoring of mental wellbeing via staff survey	16	29
Access to a counsellor	3	28
Exercise and recreational classes	13	28
Visits from external speakers on mental health	13	24
Have an internal mentoring scheme in place	9	22
Doona / mental health days	3	10

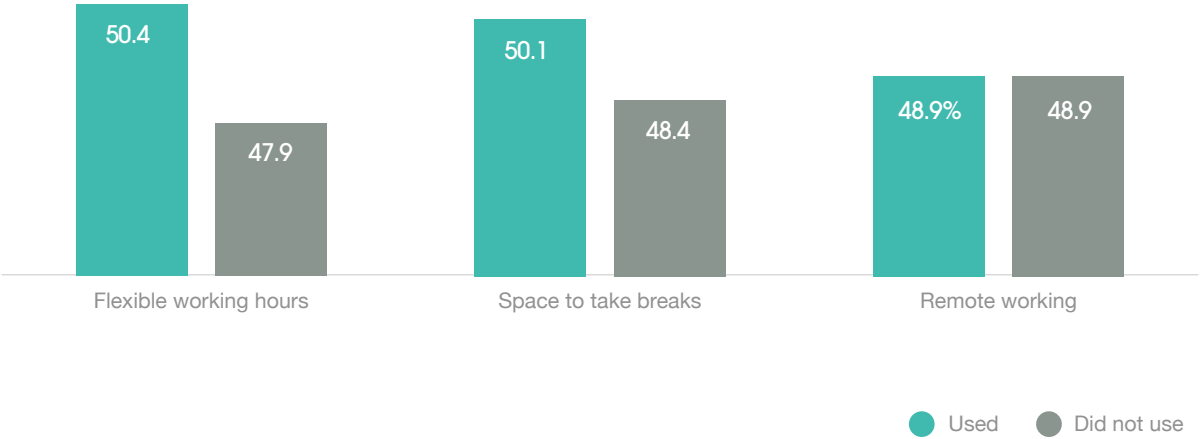● % offered the initiative   ● % who use the initiative

Furthermore, we are able to look at whether these initiatives are shown to be a benefit to mental wellbeing, both at a self-reported level and as measured by WEMWBS.

However, it is worth noting that we were only able to report on a handful of initiatives with sufficient usage base sizes. As shown by the following chart, those who used flexible working and space to take breaks at lunch have higher mental wellbeing scores as measures by WEMWBS. This is also reflected in self-reported mental wellbeing, with 93% saying flexible working improved their mental wellbeing, and 69% for break space.

WEMWBS scores amongst those who used remote working and those who didn't are equal, this is potentially explained by the mixed experiences people have had working from home during the COVID-19 pandemic, covered in more detail later in this report. Nevertheless, 82% of those who used remote working said they felt it improved their mental wellbeing.
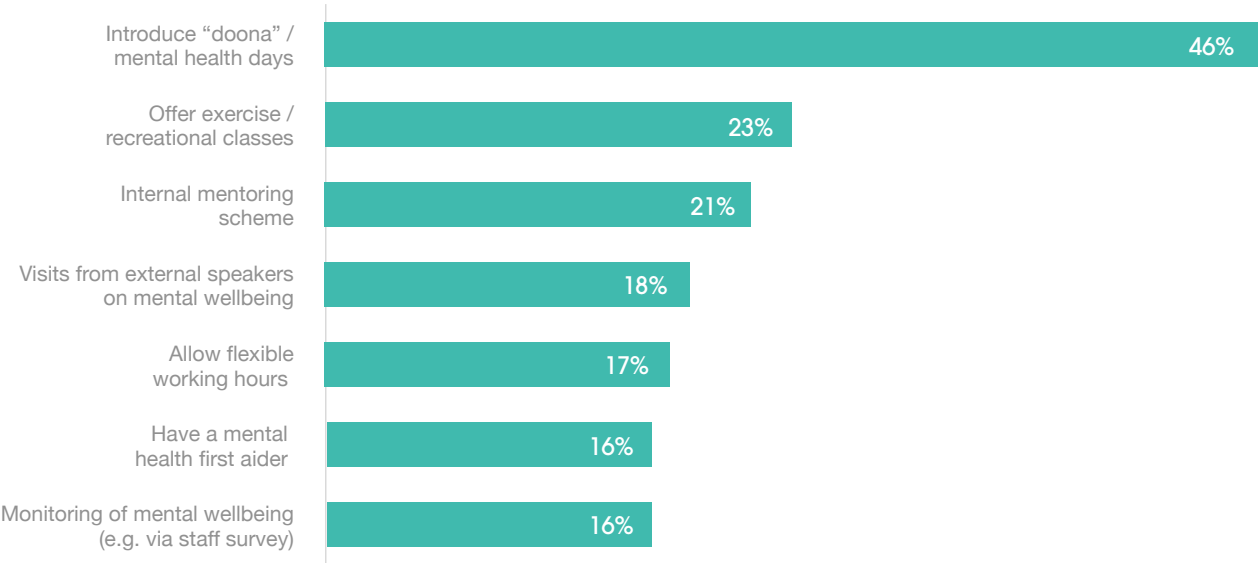
Wellbeing scores (WEMWBS) of those who used each initiative, versus those who did not

Flexible working hours: Used 50.4 | Did not use 47.9
Space to take breaks: Used 50.1 | Did not use 48.4
Remote working: Used 48.9% | Did not use 48.9

● Used   ● Did not use

Room for more

There is a demand from employees for companies to offer more initiatives to support wellbeing. Almost half (46%) say they would like duvet/ mental health days (only 10% are offered this currently) and 23% would like to be offered exercise/recreational classes at lunch or after work. We recommend offering a variety of initiatives to provide suitable support for all employees, as something that may help one individual's mental wellbeing may not be so helpful for another.

Initiatives employees would like to see their workplace introduce

Introduce "doona" / mental health days: 46%
Offer exercise / recreational classes: 23%
Internal mentoring scheme: 21%
Visits from external speakers on mental wellbeing: 18%
Allow flexible working hours: 17%
Have a mental health first aider: 16%
Monitoring of mental wellbeing (e.g. via staff survey): 16%

Culture change and openness is key to ensuring the success of wellbeing initiatives

Introducing initiatives is a really important step in improving the mental wellbeing of employees, but employers must also be making a concerted effort to change the underlying culture around mental health within the company. Having initiatives in place without encouraging an open culture about mental health can risk employees seeing the initiatives as a token or tick-box exercise. An individual and personal approach of listening to and checking in with team members is key to fostering this culture of openness about mental wellbeing. This has been voiced by a number of researchers who took part in the survey when we asked what employers should do to support employee mental wellbeing.

I think it comes down to the **culture of a company**. To support mental health, the leaders of the company should **openly talk about mental health**, have support programs in place, and continuously promote these. Managers should be mindful of their team members' mental health - they can do this by having **regular catch ups and getting to know their team** well enough to be able to identify they are 'off' or seem to be struggling. Companies can't rely on staff to self-nominate when they are struggling - oftentimes if someone's mental health is suffering, **they themselves don't know it and rely on their team members to check in** and provide support.
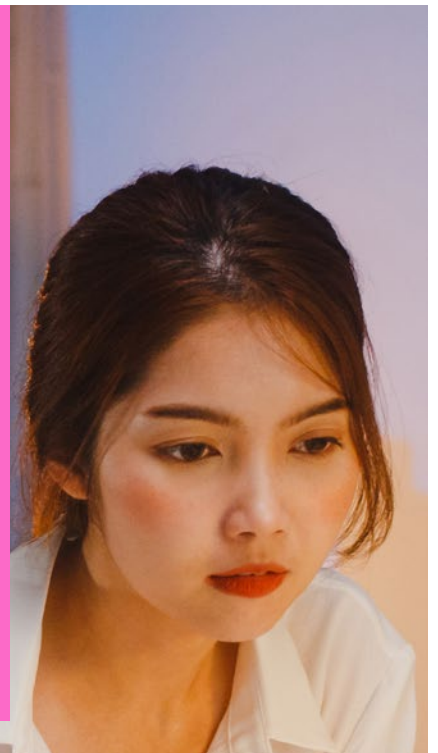
"Firstly, create a transparent culture where it's ok and accepted that one speaks about mental well-being. And then make sure that leaders are sufficiently trained to have those conversations as well as have tools to offer and support."

"Encouraging taking sick leave for mental health. Offering time in lieu for over time more often and encouraging people to take it… Being positive about taking care of your mental health, applauding good mental health practices, rather than waiting for the break down and need for more complex services."
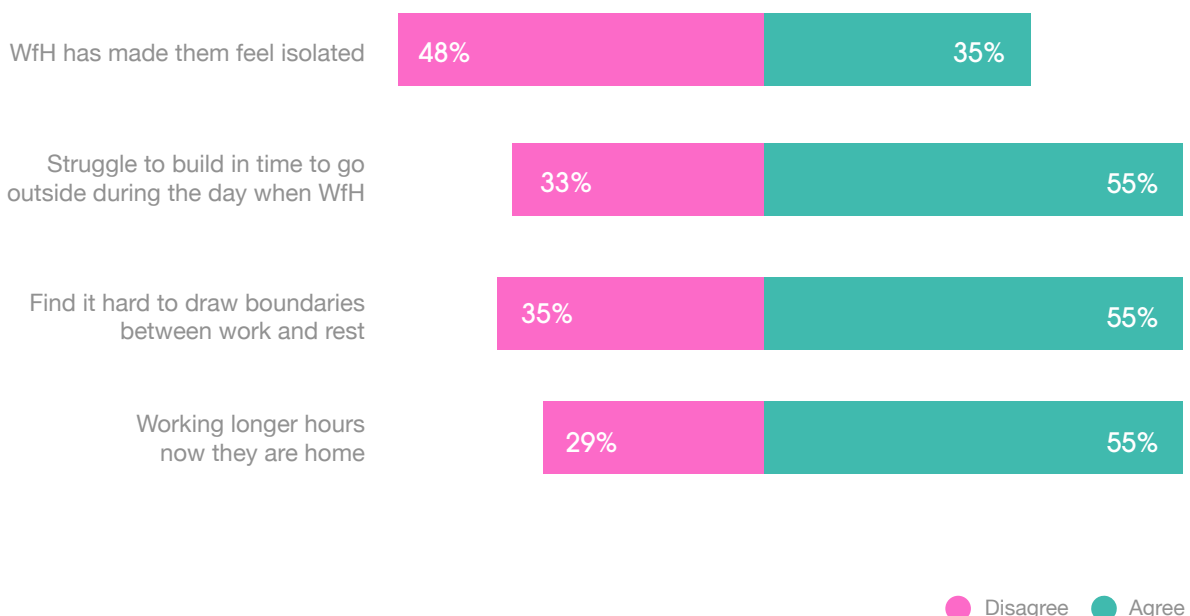
3. LEARN FROM THE LOCKDOWN

One of the major responses to the pandemic was the lockdown which required employees to work from home if possible. This was quite some change for most of the industry, as only 52% of researchers worked from home before the coronavirus outbreak – 13% full time, 40% some of the time.

It's no surprise then that 96% of employees in the industry are currently working from home. Our findings show that there have been huge benefits from doing so and employees want to see some changes remain. However, the picture has not been perfect, with a considerable number finding the experience a challenge. As we come out of lockdown, employers should try to learn from the experience and maintain practices that have been beneficial to employees. They must also recognise that the experience of the crisis varies from person to person – approaching the return to work should put the individual first.

> "I'm working longer hours, feeling like I always have to be available and "online", scared to leave the house and have an urgent request come through"

Experiences of Working from Home

	Disagree	Agree
WfH has made them feel isolated	48%	35%
Struggle to build in time to go outside during the day when WfH	33%	55%
Find it hard to draw boundaries between work and rest	35%	55%
Working longer hours now they are home	29%	55%

● Disagree ● Agree

So, although there are some clear benefits to working from home, like feeling more relaxed and being free from the bad parts of commuting, there are also downsides, notably challenges with separating work and rest. Indeed, there is some division of the effects of working from home during lockdown; whilst 40% say it has improved their mental wellbeing, 25% say the opposite.

Those who have found it negatively affecting their mental health cited a number of pressures, many mentioned the challenge of missing socialising with colleagues, loneliness, working longer hours and the stresses of looking after small children:

"Juggling family, home schooling , caring responsibilities and work demands which is difficult impacted my mental health"

"Although working from home has it's many benefits, negative aspect is feeling somewhat isolated from the team and not having regular catch-ups like I used to when working in office, more from a social perspective"

"Feel isolated, lonely. I coparent two primary-aged children and live alone 50% of the week. The other 50% I am looking after 2 small children and have no adult company. I miss the adult conversation and companionship that work provides."
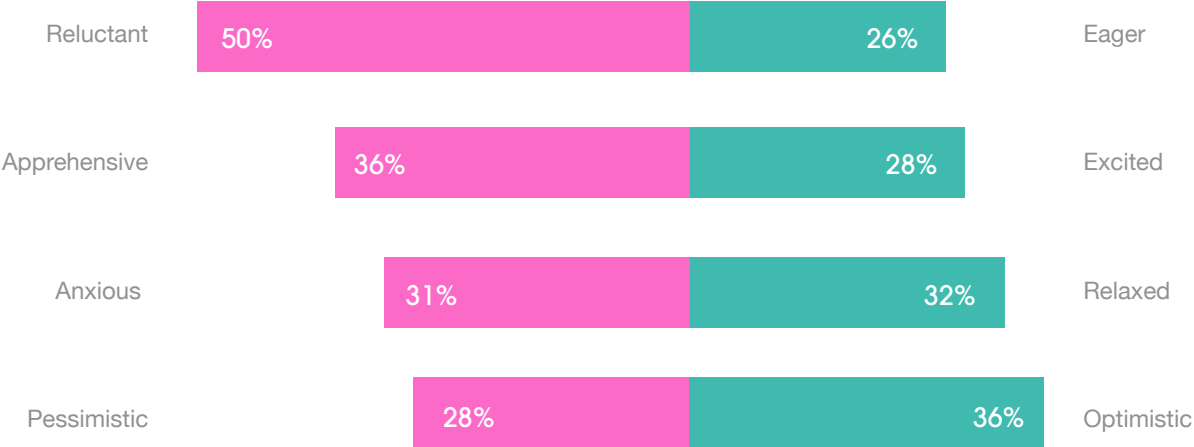
Nonetheless, an overwhelming 99% want to continue working from in some capacity when lockdown is over, with most wanting to work from home a few days a week (64%), though 22% would like to do so full time.

Returning to office life

When it comes to returning to the office, there is a mixed response in terms of how Australian researchers feel about this, with half (50%) feeling reluctant.

Feeling about returning to the office

	Negative	Positive	
Reluctant	50%	26%	Eager
Apprehensive	36%	28%	Excited
Anxious	31%	32%	Relaxed
Pessimistic	28%	36%	Optimistic

The main concerns that people have about returning to the office are losing the free time gain whilst working from home (56%), busy commutes (46%) and having to use public transport to get to work (43%). These are factors that employers will need to take into account when planning a return to the office.

LOOKING AHEAD…

Though the research industry does see high levels of people struggling with their mental wellbeing to some degree, it is also ahead of the curve in terms of taking action to address the problem. Employees are taking advantage of initiatives they are offered and reaping the benefits on their mental wellbeing. Attitudes are changing for the better and researchers feel more comfortable communicating issues around mental health than workers overall. While things are moving in the right direction, there is still a lot of work to do to for mental wellbeing to be considered on par with physical wellbeing. Culture change takes time, but the industry is on the right track.

The ongoing pandemic puts the industry's positive trajectory when it comes to mental wellbeing on shaky ground. There are numerous ways in which the crisis will impact workers, from anxiety surrounding the virus itself to the fear of job loss. Indeed, our findings show that 31% of research professionals are anxious about returning to work and 50% are reluctant to go back. Companies in the research industry must be mindful of their employees' mental as well as physical wellbeing when they begin the transition back to the office and establish a new normal.

With every challenge comes opportunity. We can use this crisis to re-examine our working culture as an industry and make it better for all of us. As the long-term implications of the pandemic have yet to be determined, employers should make it a point to cultivate an environment of support and openness, protecting employee wellbeing long after the pandemic is over.

AUTHORS

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Sophie is passionate about mental health and holds a BA Hons in Experimental Psychology from the University of Oxford. As well as heading up Opinium's workplace mental health research team, Sophie works on a variety of different projects from design to delivery, ranging from large-scale quantitative research and international studies, to in-depth qualitative pop-up communities. Sophie is heavily involved in the brand and comms space, charity sector and social research.

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About Opinium

OPINIUM is an award winning strategic insight agency built on the belief that in a world of uncertainty and complexity, success depends on the ability to stay on pulse of what people think, feel and do. Creative and inquisitive, we are passionate about empowering our clients to make the decisions that matter. We work with organisations to define and overcome strategic challenges – helping them to get to grips with the world in which their brands operate. We use the right approach and methodology to deliver robust insights, strategic counsel and targeted recommendations that generate change and positive outcomes.

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About the Research Society

The Research Society is the leading research association in Australia.

The Research Society is the community for supporting and developing research, insights, CX and analytics professionals throughout their career with specialist training and professional qualification (QPR), mentoring, networking and research awards.

The Research Society is underpinned by a strong ethical Code of Professional Behaviour that aligns with the Australian Privacy Principles.

The Research Society supports organisations to certify to globally recognised ISO standards and has exclusive rights in Australia to the Fair Data program that ensures companies collect, store and use the general public's personal data and information in line with Australian Privacy and EU GDPR requirements.

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