

IMPACT

ISSUE 18 JULY 2017

USING EVIDENCE & INSIGHT TO MAKE A DIFFERENCE

Marketing mix modelling
under the microscope –
11-page special report





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- Retail/Shopper
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Just cause



Jane Bainbridge
Editor

Every so often there are shifts in corporate consciousness. We have had businesses recognising the role they need to play in improving recycling rates. This then broadened to more ambitious sustainability strategies for the enlightened, from raw material sourcing, labour practices and product end-of-life trade-in policies.

Corporate consciousness is often playing tag with government legislation which, in turn, is invariably a few hops behind public opinion.

But as one policy has its moment in the limelight and then moves down the agenda to make way for another, it rarely signals universal take-up or a satisfying closure, where that world-worry no longer needs to be considered... not that I'm belittling any effort to improve governance or ambitions to run a business in a more environmental or society-sustaining way.

Indeed as I write this from a somewhat embattled London – bruised by multiple terror attacks and a devastating tower block fire, politically reeling from a General Election and now the nascent Brexit negotiations – quite frankly, anything anyone does – be they individuals, politicians, conglomerates – to make the world a better place is warmly welcomed.

In our local communities, many of us recently joined together to remember the murdered Labour MP Jo Cox in The Great Get Together, which her husband deemed the most fitting tribute. It chimed with her maiden House of Commons “we have far more in common than

that which divides us” speech. But celebrating all that we have in common, does not mean denying our differences – the delightful mix of faiths, gender, sexuality, physical and mental ability that makes up our society.

Indeed, diversity is now the latest cause to gain momentum. Organisations are waking up to the need for the workplace properly to reflect their customer base, or the community within which they are based.

Financial services company Aviva has paid more than lipservice to this, as its global inclusion director – and MRS president – Jan Gooding explains in our profile (p20). Her mantra “acceptance without exception” should be a rallying cry for business of all sizes.

As research shows a shifting of priorities among the population to society and wellbeing – something that is driving Andy Dexter’s latest project (see business, p60) on happiness – he challenges firms to ask themselves some difficult questions, not least ‘why is our world better for your presence?’.

Food for thought for each and every one of us.



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Gray, a journalist and author, interviewed International Flavors & Fragrances' Stan Knoops for the insight and strategy feature on p50.

Jane Simms



Simms is a former editor of *Financial Director*. She talked to mentors and mentees taking part in the new MRS scheme for our careers story on p76.

Tim Phillips



Phillips is a journalist, broadcaster and author. A regular contributor to *Impact*, he wrote the special report on marketing mix modelling on p26.

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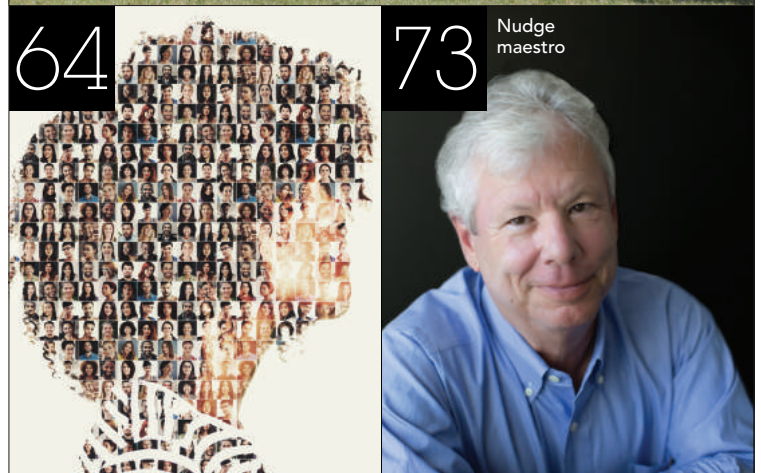
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Will Amlot



Amlot is *Impact's* regular photographer. For this issue, he captured Aviva's Jan Gooding for the profile piece on p20. willamlot.com

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Winner



Winner



Winner



Highly
Commended



Highly
Commended

A different order

While I was growing up, my father ran a series of small businesses. No-one in my family had ever worked in a large organisation – they were mostly farmers, rural GPs or suchlike. So, during my first few years at Ogilvy, I assumed big businesses operated much like small ones, only on a larger scale. This, I quickly learned, is far from the case.

In my first month as a trainee, I spent two weeks in the creative department of what was then called Ogilvy & Mather Direct. One of my tasks, working under an experienced American copywriter, was to write a solicitation letter, cross-selling a fairly obscure financial product. Call it beginner's luck, but the letter was quite a success; the response rate was twice that of the control and the ROI was 5:1 in the first six months alone (it was a fairly profitable product).

"Wow," I said. "Let's mail some more people with the same letter." I was pretty certain that if you had shown my father any sure-fire way to make £5 for every £1 he spent, he would have done quite a lot of it.

"No," it was patiently explained to me. "It doesn't really work like that in big organisations." The client had been allocated a budget and a target for this piece of activity, and they had spent their budget and exceeded their target. So there was nothing more to be done. "Maybe next year."

This seemed strange to me. What is the point of measuring anything if the results do not – indeed, cannot – change what you do next? If it doesn't alter subsequent actions, measurement is merely a glimpse into the rear-view mirror. It doesn't affect where you're headed.

It now occurs to my older, more cynical self that measurement is often seen more as an obligation than an opportunity, and that much



“Measurement is often seen more as an obligation”

of what passes for 'marketing accountability' is arse-covering or blame-avoidance performed under the guise of rigour. The same, presumably, goes for market research when it is used 'for support rather than illumination'. Perhaps the majority of research or measurement is commissioned and used not to inform decisions in advance, but to defend them in retrospect. This can be a massive waste of time and effort.

But what if you could use behavioural science to solve this problem? I believe you can; all you need to do is change the way you present findings, and inject a forced question at the beginning of the process. This is what Richard Thaler, the author of *Nudge*, calls 'managed choice'.

What we typically do when we present results is to say, 'here are the results, now what do you plan to do?' The problem with this approach is that it allows any decision-maker to do what they were planning to do anyway, with cherry-picked parts of your research tacked on to lend

confirmation bias. If this happens, the research or measurement is being used defensively. It has not changed behaviour – all it has done is allow someone to defend a course of action they were planning to take anyway.

If, before presenting the results, we asked 'what do you plan to do if the research reveals X, Y or Z', our research or evaluation becomes a great deal more influential.

Let's go back to that mailing I wrote in 1988. What if we had asked the client before the mailing – or in advance of presenting the results – 'What will you do if the ROI is a) 1:1 or less, b) 2:1 c) 3:1 d) 4:1 or e) 5:1 or higher?' How much more likely are they to say: 'Well, with 4:1 or more we'd go and find some extra budget?'

Now you've changed the game. You've reduced confirmation bias and created conditions under which your research findings might change what the company does in response. At the very least, it would be awkward for them to say, regardless of the results, they would do exactly the same thing.

Market researchers already know about 'order effects' – the extent to which the sequence in which questions are asked changes the answers people give. In this case, by simply reversing the order in which research is presented, we might be able to make it more powerful.

Human behaviour and decision-making is path dependent. Often, the most important – and under-used – technique in changing behaviour is simply to experiment with doing the same thing in a different order. If you sign a tax form at the top rather than the bottom, you are more likely to tell the truth. ■

Rory Sutherland is vice-chairman, Ogilvy & Mather, UK



UK – p14
Male identity in the UK is changing, especially among millennials. Jake Goretzki of Crowd DNA outlines how this trend offers opportunities for brands.



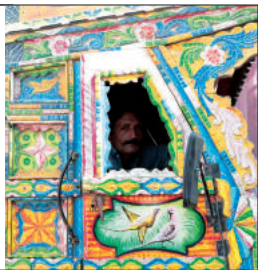
France – p12
Having just emerged from a fierce presidential election, the mood in France is uneasy. Simon Atkinson of Ipsos Mori shares findings from its global trends survey that could offer pointers for a 'better France'.

Global briefing

News, views and insight from around the world – from marginalised truck drivers in Pakistan to the shifting nature of male identity in the UK.
Edited by **Bronwen Morgan**

Pakistan – p10

Truck drivers in Pakistan are marginal to the point of being outcasts. It's this distance from the mainstream that offers a useful perspective for brands, says Jim Mott of BAMM.



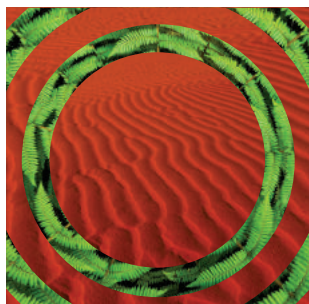
Asia – p18

Associations with sickness have hampered the sale of dietary supplements in tablet form across Asia, highlighting the importance of understanding local culture. By Bronwen Morgan



Australasia – p16

Nicola Stokell of Kantar TNS explains why brand campaigns often perform differently in Australia and New Zealand, and offers tips to improve the effectiveness of trans-Tasman communications.





Learning from the margins

Speaking to those on the edges of society can be as valuable to brands as interacting with those in their target demographics, as **Jim Mott** of BAMM learned when conducting research with truck drivers in Pakistan

As researchers, we are often called upon to represent and understand the cultural mainstream of society. This is natural enough, given that – for most big brands – this is where their audience heartlands reside; the ‘safe’ centre ground of shared consensus.

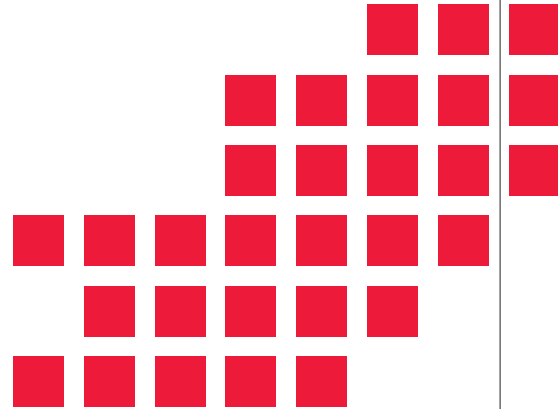
It is more difficult to operate in the margins of society. Defined by those who deviate from social norms, the margins are made up of people and groups who are perceived as a threat to the values espoused by those at the centre.

Yet it is where the values of the mainstream are challenged or brought into question that they are most sharply defined – which makes the margins an enormously generative space in which to operate. This offers a potent benefit to clients, who can build communications that have a great deal more creative space in which to play.

While it requires sensitivity to operate in this area (the recent Pepsi ad is a spectacular example of what happens when brands get this wrong), it can tell us much about the direction of travel of a



PAKISTAN



particular culture or set of values. BAMM's recent work with truckers in Pakistan for Shell is a good example.

Here, the challenge was to help to build better brand communications and campaign activities that would demonstrate a deep-rooted relationship with this group, beyond the usual blandishments of trucking being 'a tough life'.

Marginal to the point of being regarded as outcasts, Pakistani truckers are a group of perennial outsiders with a reputation as reckless troublemakers, drug addicts and sexual predators. Their job places them at the sharp end of Pakistani society and far outside what might otherwise be regarded as polite society. By speaking to this group, we got to the heart of a more uncomfortable – but also more grounded – view of Pakistani culture: a stripped-back reality, which was also the bedrock for Shell's understanding of how to operate in this region of the world.

Understanding truckers in Pakistan

Pakistan has some of the most dangerous transport routes in the world. Roads such as the Razdan Pass, the Karakoram Highway and the Babusar Pass are as famous for

their breathtaking mountain scenery as they are for their hairpin bends, lack of guard rails, and perilous 1,000ft drops.

It is on these gruelling routes that truckers ply their trade. Their brightly painted vehicles are often more than 20 years old, and lacking even basic hydraulics or suspension. Most have ornate wooden superstructures built onto them, enabling them to carry far beyond the regulation loads for the vehicle's class, putting their tyres at constant risk of bursting under the weight.

Carrying such loads has become a necessity as trade has dwindled. Deadlines have got tighter, leaving truckers suffering from frayed nerves and exhaustion, with little room for respite between jobs before they hit the road again. To cope with the pressures they are under, many turn to hard drugs, such as high-grade hashish or heroin, a pinch of which can be bought in a small bag for the equivalent of about 66p.

Speaking to a mainstream audience would not have given us an indication that drug abuse is an issue in Pakistan, as this remains a taboo subject in a country that is deeply religious. Yet, among the truckers we spoke to, it was widely acknowledged as part of the everyday reality of

the job. While it is potentially more widespread among truckers, drug abuse is by no means uncommon in Pakistan. The United Nations Office on Drugs and Crime calculates that, as of 2013, 6.7m people – or 11% of the population – were using illicit substances, with 4.25m of these drug dependent.

If drug addiction is one issue that speaking to a mainstream audience would not have revealed, low literacy is another. If we had spoken to people in Islamabad, literacy rates would have seemed around the norm; in the city it stands at 87%. But few of the truckers we met could read or write. For many, their highest aspiration was for what little money they sent home to offer their children a better education.

Getting to the heart of things

These are just two of the most striking examples of what our research among this group taught us. By avoiding the mainstream, we could get to the heart of difficult issues far more quickly, and establish tension points that might otherwise have taken weeks to uncover.

For Shell, bringing these seemingly nebulous points together offered a clear commercial advantage in helping it to develop its campaign.

Instead of offering them the usual folksy truisms that respectable people like to use to skirt around uncomfortable issues, we were able to offer a lens that was more gritty, but also more grounded.

Jim Mott is a research director at BAMM.

FRANCE



Paradise Lost

Can France's new president help French society become more at ease with itself? **Simon Atkinson** shares findings from Ipsos's Global Trends survey on the problems facing the country

Ipsos's Global Trends survey gives us a panoramic view of how 18,000 people in 23 countries feel about the world – and their lives – today. The 400-question study includes sections on what citizens think of their governments, businesses and so-called experts.

We can certainly find much in here to be concerned about, as well as some reasons for being more cheerful – but one of the things that immediately stands out is that *countries do still matter*. There may be global, overarching themes – fragmentation, cohesion and uncertainty – but each country has its own particular set of attitudes and aspirations. And, in the case of France, we see rather more fragmentation and uncertainty than we do cohesion.

France is, of course, just emerging from the bruising presidential election campaign between Emmanuel Macron and Marine Le Pen, which has starkly underlined the challenges that the country faces. What our survey does, is put these pressure points in context. Set against a global backdrop, the French results are very worrying indeed.

Five reasons to be worried about France

1 The New Normal: 84% of French people say 'we live in an increasingly dangerous world'. France is still coming to terms with what the terrorist attacks in Paris and Nice mean for the country. So far, so bad. The French are actually not alone here: 82% of the global population feel the same. But this is just the start.

2 A Big No to Globalisation: Just 31% say that 'globalisation is good for my country'. Only Belgium scores lower. In Brexit Britain, that figure stands at 66%.

3 Nostalgia: 66% say 'I would like my country to be the way it used to be'. Here, France records the third-highest score of all 23 countries covered.

4 Gloom and doom: Just 10% say they are 'optimistic' about their country's prospects over the next 12 months. Across the Channel, the British manage to score 33% while Canada registers 52%.

5 Generation strains: These are not just short-term problems. Just 10% of French people say today's youth will have a 'better life' than their parents – the lowest of any country.



Our work on the *Perils of Perception* has documented how wrong people often are about what is happening in the world around them. But the negative picture emerging from these French results does appear to be grounded in reality – at least to a degree. France may still be one of the richest countries in the world, but PwC's latest analysis shows that it is poised to lose its place among the Top 10 world economies over the next decade. Britain, meanwhile, is expected to hang in there, albeit by its fingertips.

What to do? On the eve of the French presidential campaign, we found only 9% of French people to be positive about their government's performance; only Spain and Mexico score lower – which helps to explain why the final two candidates were both from outside the mainstream political parties.

This sense of alienation extends to the commercial world. In France, just 27% say they have a 'high level of trust in business in general' – the lowest of any country.

Turning the corner?

The Trends survey gives us a few pointers as to what a 'better France' might look like.

Perhaps it would be better to have more women in the limelight; 59% in France say that 'things would work better if more women held positions with responsibilities in government and in companies'.

And what of the potential that *doing good business* could unleash? Our study finds 62% of French consumers saying that 'in the future, the most successful brands will be those that make the most positive contribution to society, beyond

just providing good services and products'. Which raises the question of whether France can do more with the things that France is good at.

Local produce, grounded in the *terroir* of a particular area, is not going out of fashion. Across France, 69% say 'I am more likely to buy products that are locally grown than those that are grown elsewhere'.

So, how to bring about the change that the French people so clearly want to see?

Six months before the elections, 66% of them were saying they wished 'we had a strong leader, not the current elected government'. In opting for Macron v Le Pen, they showed the politicians what they thought of the existing set-up.

It's too early, of course, to judge whether Macron is going to be that strong leader the public is looking for. But we should be in no doubt that this is a country not at ease with itself – something that is thrown into sharper focus against this international backdrop. Some countries are reasonably upbeat about things; France, most certainly, is not.

Simon Atkinson is chief knowledge officer, Ipsos Mori



He's not the man

The image of British – and global – male identity is shifting, in particular among millennials. This opens up opportunities for brands to connect with them in different ways. By **Jake Goretzki**, of Crowd DNA

Male identity is hot right now, in and beyond the market research sector – from UK grime and hip hop artist Stormzy's musings on male mental health, to comedian Robert Webb's forthcoming book *How Not to Be a Boy*. At Crowd DNA, we've developed a close interest in masculinity through working with clients seeking to remain relevant to a young male audience – in an age when men aren't the 'lads' they were a decade ago.

Of course, the debate about what makes a man isn't new (remember the 'new man' and the 'metrosexual?'), but it is especially visible today.

For Generation X-ers, often raised by feminists and moisturising since their teens, opining on male dilemmas still



he was

feels uncomfortable, frankly. We live in a patriarchy. Power is male; wealth is male; and the UK pay gap grants men a 9.4% bonus over women. Outmoded ideas of men as promiscuous risk-takers and women as meek and emotional remain ubiquitous. “My heart bleeds for you,” my mum would tell me.

Male identity has been changing among millennials. The drivers of this range from the (slow) advance of women in society to the

mainstreaming of gay male identity. Male and female space has converged, from pubs to stag/hen dos. Health and body are greater male preoccupations than ever before.

Today we see a more fluid, individual masculinity that’s less binary or one-size-fits-all. In a YouGov survey in 2015, only 2% of men aged 18 to 24-years-old said they were ‘completely masculine’.

Men have become more intimate and emotional; ‘bromance’ is a word and US Presidents can cry now. When they do have children, men are more involved, embracing fatherhood and not trying to escape the fact.

Yet, for all this heartwarming progress at the leading edge, we’re seeing new tensions around masculinity. Most prominent is ‘toxic masculinity’, embodied by the – paradoxically, make-up-wearing – leader of the free world, Donald Trump. Behind him is a parade of back-to-the-kitchen growlers and alt-righters.

Worse still, millennial men are living with a misery epidemic. As the Campaign Against Living Miserably (CALM) reminds us, suicide is the biggest killer of young men – a subject that has been touchingly covered by UK rapper Professor Green. Being told that boys don’t cry – and appeals to ‘just be a man’ – aren’t helping.

There are lesser tensions, too. We see an increasing divergence between the generations over what it means to be a man, and a tendency among older males to misconstrue today’s men as victims of female success; ask the Baby Boomer icon Jeremy Clarkson how he feels about male identity today. We also see a continued grapple to pin down an aspirational male archetype for today. Strength and grit still

dominate, as witnessed by the surge in Weekend Warriors and Tough Mudders (endurance-race participants).

Brands are increasingly reflecting changes. Unilever’s ‘Find Your Magic’ campaign for Lynx/Axe is a gold-standard case study for us, celebrating a more nuanced, diverse idea of masculinity – even more impressive as it comes from a brand once associated with a laddish posture that irritated women. Fashion brands have been relatively brave, too; Diesel’s ‘Make Love Not Walls’ campaign doesn’t hide whose proposed wall it’s talking about.

In drinks, Coors lets us laugh at Jean-Claude Van Damme’s faded machismo, while Southern Comfort liberates with a pot-bellied beach walker. Over in the Deep South, Jim Beam is now fronted by Mila Kunis; suddenly, Jack Daniel’s gruff men of Lynchburg Tennessee are looking a little unreconstructed.

There are many opportunities for brands to speak meaningfully to today’s young men. They can take a stand against toxic masculinity by talking to men and women as one camp – tapping into male goodwill for female progress. Nike’s ‘Unlimited You’ is a bracing male and female story. ‘Walking the talk’ as an organisation is also essential; American Apparel’s seedy casting of young submissive women won it few friends and bordered on the toxic. As Elina Vives, senior director of marketing at Coors, has said: “Any brand nowadays has to stop insulting women first and foremost, and be much more inclusive.”

Brands can also work on the male happiness project: stoicism and old masculinity are a straitjacket and, frankly, young men need cheering up. Friendship is now a kinder, warmer experience than the ‘lad banter’ and locker room of old. It’s time, too, to banish the stock ‘doofus dad’, who is bemused by parenting and shopping. As Lynx/Axe’s shift showed, disrupting conventions of masculinity and bringing greater nuance to the man you portray can invigorate a brand and win over enemies.

Today’s male? He’s not the man he was – and a good thing, too.

Jake Goretzki is associate director at Crowd DNA



AUSTRALASIA

Neighbours, but worlds apart

Understanding differences – not similarities – between New Zealand and Australian markets is the key to more effective trans-Tasman marketing, according to new research from Kantar TNS New Zealand. By **Nicola Stokell**

Businesses marketing their products on both sides of the Tasman Sea face a number of common issues and often struggle to see why their campaigns perform differently in Australia and New Zealand. To find out why, we explored whether there were key differences between Australian and New Zealand cultural constructs, the competitive landscape, the equity of brands in each market, media consumption and digital attitudes and behaviour.

With similarities between Kiwis and Australians often quite obvious – some shared history and values, a semi-integrated economy, a love of the outdoors – the research looked into the differences and asked the questions: ‘Why are we seeing such differences in terms of the communication effectiveness?’ and ‘Why do some Australian ads not travel well across the Tasman?’.

The answers revealed more pronounced differences in areas such as: the cultural stereotypes

New Zealanders and Australians aspire to; humour; and heroes and celebrities.

Typically Australian stereotypes are more fun-loving, cheeky, sarcastic and like to make fun of themselves. They are also regarded as more confident, brave and good at standing up for themselves.

On the other hand, Kiwi stereotypes stand out for their ‘can do’ attitude and tendency to be environmentally conscious. They are also seen as more adventurous, hands-on, family-focused and loyal.

But a critical factor is that stereotypes can sometimes be very different from how we actually see ourselves, which is the case here. Australians don’t feel as laid back, sociable, adventurous or as fun-loving as the cultural stereotype would suggest – or as tough and brave as they’d like to be.

New Zealanders, too, are struggling to live up to their ‘can do’ attitude and environmentally conscious image. They don’t feel as adventurous or as sociable as their stereotypical image suggests, but they do feel more confident and sarcastic, which are more typically thought of as Australian traits.

It is the stereotypes that are often communicated in New Zealand advertising – typically an exaggerated expression of New Zealanders and their culture; so the chances of disconnect are high, if they can’t identify with what they see being communicated.

The research also revealed a different view of heroes and celebrities.

Australian heroes are high-profile. Resilience, bravery, courage and confidence are admired, specifically the ability to transform in the face of adversity.

New Zealand heroes are typically everyday people – ‘my mum and dad’ – hard-working, loyal, caring people who genuinely make a

difference to their families and communities.

Like brands, TV celebrities can have distinct profiles and reputations on opposite sides of the Tasman, and some can either antagonise or win over different markets.

Australians aspire to a more Americanised narrative, and the strong US accent feels aspirational. However, for New Zealanders this Americanised-style creative can lack relevance; Kiwis are more likely to respond positively to British rather than American cues.

These differences, when coupled with some proven truths about the competitive landscapes of the two countries, really start to offer valuable insights.

For example, the New Zealand market has less competitive intensity and is more price-conscious than Australia; Kiwis are less willing to pay a premium for added value or extra convenience.

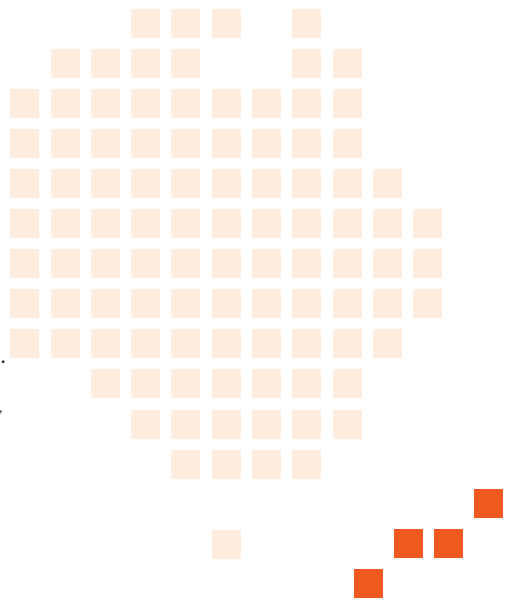
Confectionery brands in Australia and New Zealand present a great example of how the competitive landscape is rarely the same, and brands often have different levels of familiarity and engagement in New Zealand than in Australia. Their campaigns also highlight that superficial changes to localise – such as voiceover dialect and product shots – are often not sufficient to improve relevance.

Nicola Stokell is qualitative director at Kantar TNS New Zealand

Top five tips

How to improve effectiveness of trans-Tasman communications:

- Challenge cultural assumptions – stereotypes differ from reality
- Identify a unifying insight early on in the creative process
- Differences in brand equity can have an impact on a campaign’s ability to travel
- Understand the competitive set for your brands in each market
- Be specific – culturally ambiguous communications often fail to resonate.



ASIA

Hard to swallow

In Asia, sales of dietary supplements in tablet form are hampered by cultural associations with sickness. This has consequences for the growing probiotic market, writes **Bronwen Morgan**

Asian families have long been familiar with probiotics - live bacteria and yeasts, often added to yoghurts or taken as food supplements to restore the natural balance of the gut. This is largely thanks to Yakult, a fermented milk product that originated in Japan and has been sold door-to-door across Asia for decades.

These door-to-door sales are carried out by 'Yakult Ladies', of which there are more than 80,000 worldwide - including 40,000 in Japan. Yakult Ladies were originally hired as a salesforce to convince sceptical consumers that bacteria wasn't always harmful - and, in fact, could be healthy. These women are trusted by local people because they are recruited from the same regions, so can communicate easily with households - not only about the products, but about issues related to their communities.

Now, with the ongoing urbanisation of Asia - plus higher disposable incomes and heightened consumer interest in health products - sales of commercial probiotics has increased. According to marketing intelligence company BCC Research, Asia Pacific leads the compounded annual growth rate for probiotics, with an anticipated 8.3% over five years.

While Australia and Japan are among the largest markets for probiotics, China and India have experienced heightened awareness of the

health benefits of these products. Across the region, probiotics in the form of dietary supplements, yoghurt and sour-milk products had a combined retail value of \$17.6 billion in 2016. Figures from Euromonitor reveal that this market is expected to grow further in Japan (8%), South Korea (19%) and China (23%) by 2021.

But while the trend for consumption is rising, data has indicated a widening gap in the different formats of probiotics sold, according to a report from the Institute on Asian Consumer Insight (ACI). The many dietary supplements imported into Asia from the US and Australia are in tablet form - but, in Asia, the swallowing of tablets is associated with treatment for sickness, rather than for staying in good health.

What's more, food is strongly linked to culture in Asia, and most foods are prepared fresh and consumed daily. Different foods are also perceived to have different effects on the body. 'Heating', 'windy' or 'cooling' effects all have perceived health benefits, and

each element serves to manage the balance of 'yin and yang', the Chinese philosophy of complementary, opposing forces. This link between culture and food - as well as the perceived relationship between tablets and sickness - means there is a definite preference for probiotics in food, such as yoghurt or drinks, over tablets.

Another option, says Cyndy Au - regional director of regulatory and scientific affairs, Asia Pacific, at DuPont Nutrition & Health, and an ACI fellow - is to develop sustainable probiotic strains that can be delivered in formats such as powder, which could be added to familiar local dishes such as soups, rice or porridge.

According to Au, products have a higher chance of success if they are in a format that takes account of underlying cultural beliefs and don't rely on a dramatic change in eating habits. If, by introducing them in this way, Asian consumers start to see probiotics as part of their daily diet, this could drive growth, she says. ■

“Businesses are not making the most of all the information that is being generated because they simply do not have the skills to analyse and interpret it”

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Jan Gooding is a breath of fresh air in so many ways. She's always been something of a rarity among corporate marketers in that she's candid and honest, and willing to talk to the press. As clever and reflective as she is frank, she's always been a go-to contact for a pithy quote.

Gooding has the gift of imbuing her business perspectives and insights with the personal.

The intellect has obviously always been there – she read economics at Cambridge – but no doubt the reflection has increased over the years. For Gooding's path through life – both professional and personal – has twisted and turned, to reach a point where some of those experiences have collided.

It's not hard to see why Aviva asked her, when she was working as its global brand director, to take on the role of global inclusion director – “I was offered diversity director, but diversity becomes men versus women, pink versus the blue team; we want an inclusive culture for everybody” – or why the Market Research Society invited her to be its president this year, taking over from Dame Dianne Thompson.

Gooding's first career, in advertising, was brought to an abrupt halt when she was sacked after having a baby. “It's one of those scandalous stories that I can't believe happened – but it did.

“You are not going to be intuitive and empathetic about your customers if you can't represent them inside your organisation”

I was on the board, went on maternity leave, developed postnatal depression – and I genuinely think my fellow, all-male board directors thought they were doing me a kindness. There were no role models then, and none of their wives worked. I felt very vulnerable at the time, but, actually, I think it's been the making of me.”

This dire situation prompted Gooding to set up her own marketing consultancy, which proved to be a roaring success. However, when the opportunity to move client-side came with a job at BT, she took it – she was in her early 40s.

“I was bluntly advised that I was too old to go back into an advertising agency. I was absolutely astonished.” So that's sexism and ageism ticked.

She stayed at BT for three brutal years, and while she learned a lot – and worked with many people she respected, including current CEO Gavin Patterson – Gooding was ready to leave. “BT

years are like dog years; a year at BT is seven anywhere else. I decided big corporates are not for me. I felt lost in it.”

It was only later, when she joined British Gas, that she realised it wasn't big corporates that weren't for her – just BT. While Gooding is very proud of the work she did at British Gas, the significance of that 10-month interim posting extended beyond market strategy, because – while she was there – Gooding fell in love with a woman. “I'd been married for 16 years, and had two, almost-teenage boys. That was a big drama for me, as I'm sure you can imagine.”

As well as the personal turmoil, the imperative to be financially secure after her divorce was part of the motivation to take on the global operations director role at Aviva. She came into the financial services company at an interesting time – it was rebranding from Norwich Union and the banking crisis had just happened.

“It has been a period of self-examination – of revisiting values,” Gooding explains. “We've just come out of a period of fixing the balance sheet and getting back on the front foot, but it's been exciting because our chief executive [Mark Wilson] has an agenda – not just to reduce cost, but to disrupt the market.”

At the start of every executive committee meeting, somebody reads out a customer letter or email – a practice introduced by Wilson. “It was a ritual of making sure you had a customer conversation before you did the rest of the business,” explains Gooding. “I've seen this very authentic, genuine intent to get back to the customer. It's hard to do in financial services; we're actuarial; we have finance and we have risk and compliance – functions that are numerate and rational.”

What's so interesting about Aviva establishing a global inclusion director is that it's not driven by a particularly altruistic agenda, or a corporate social responsibility box-ticking exercise – but by a commercial imperative.

“Our customer base has not increased for years,” says Gooding. “We're sort of stuck: we do really well; our existing customers are increasingly buying more things from us; we get new customers in and they replace the old; but, overall, the number of customers we serve has been pretty static, and we want to grow.

“You are not going to be intuitive and empathetic about your customers if you can't represent them inside your own organisation.”

Inclusion and diversity are often used interchangeably, but Gooding is precise about the ▶

The argument for a diverse workforce may have been won, but there is still a long way to go before it is the norm. The MRS's new president and Aviva inclusion champion, **Jan Gooding**, talks to *Jane Bainbridge* about good practice and measuring success

All
together
now

› distinction – inclusion is the strategy and diversity is the outcome; an outcome that will have measurable dimensions across age, gender, sexual orientation, disability, race and ethnicity.

“Gender is the only aspect where, in every market, we should be aiming for a balanced workforce. All the others will vary – the age demographic in India or Singapore will be different from the UK,” she explains.

It’s only as we delve deeper into the strategy that the complexity of her job becomes fully evident. Every country in which Aviva operates has its own demographic mix, as well as political and legal framework, so a universal strategy is meaningless and potentially dangerous.

“Each chief executive will set their own ambitions about what they want to change. I’ve already had chief executives very interested in socio-economic mobility, which is very important. My difficulty, in a global role, is that I cannot measure that in a common way. In the UK we talk about free school meals – but that’s particular to the UK.”

Essentially, there are three models that businesses can adopt when championing diversity: the ‘when in Rome’ model – if you choose to do business in a country with oppressive regimes, you don’t challenge it for risk of putting your staff in danger; the ‘embassy model’ – despite the law of that country being hostile, your workplace can at least be a place of safety; and the ‘advocacy model’ – organisations are vocal about the need for change.

“You have to do the analysis, market by market – what’s the legal context; the cultural context; how big a voice are you?” says Gooding.

“You have to be intelligent about which of these strategies you deploy and consult with the people who live there.

“Organisations have a huge role to play, because they’re concerned about their staff and about their customers. That can be a real force for good and change, because governments might listen to big business in a way that they won’t listen to a little NGO [non-governmental organisation] or an activist group.”

Gooding has an unusual perspective on some aspects of diversity. Walking in someone else’s shoes to understand prejudice or discrimination is not just a concept for her.

Having lived and worked as a straight woman and a gay woman, she has experienced the differences first hand, with the added complication of coming out later in life, and the

impact this has on friends and family as they readjust their perception of you.

“When I understood myself to be a straight woman, I had no issue with someone’s sexual orientation and, because that was my personal view, I had no idea I needed to vocalise it,” she says. So allies are vital – whether that be individuals within an organisation, men championing women, straight speaking out for LGBT colleagues, or on a corporate level where brands are associated with inclusive events.

“There are stigmas about mental health, about your socio-economic background. When leadership is inclusive, you encourage people to be visible about whatever their thing of difference is.

“In exactly the same way, organisations and brands can behave as allies,” says Gooding, who

“ To achieve inclusion and a diverse workforce, recruiters must recognise that market research favourite – unconscious bias ”

cites Aviva’s support of Team Pride and its distribution of rainbow laces. “We gave them away to our customers and staff. That’s people saying, ‘This doesn’t mean I’m gay or trans; this means I don’t have a problem if anybody is’. It’s showing there is no issue here – that change is the culture.”

But to achieve a culture of inclusion and a diverse workforce, recruiters must recognise that market research favourite – unconscious bias – and how we end up making decisions habitually. “I joke, it’s called ‘brand loyalty’,” Gooding says. “Uniquely in our industry, we have understood about unconscious bias – we just never applied it to this subject.

“It is very enlightening to understand that we all have biases and we’re all doing this to each other. Unconscious bias explains how we got here; the big, interesting bit is, what do we consciously need to do to make the material differences that are going to effect change?”

“There are all sorts of experiments going on in recruitment – not showing names, not showing gender, not showing schooling. I think some of them may be gimmicks; rather than removing names, how about just being conscious that that’s one of the things people do? How can we say we’re celebrating difference, then deny people the opportunity to show who they are? Intellectually, I find this quite challenging.”



Dame Alison Brittain, CEO of Whitbread, who recently won the Businesswoman of the Year Award, has said she favours targets over quotas because targets send a signal within an organisation that this is important. So where does Gooding sit in this debate?

“I have been known to say – when I’m sufficiently angry – it’s time for quotas. I’m part of the generation that thought this was all going to change because of meritocracy, and it hasn’t.

“But I think it’s right to have targets because you’re trying to be realistic; you will only get vacancies emerging – and the opportunities to create change – over time. The problem with quotas is that they just create resentment – and it’s very reductive just to pick one aspect of identity, and then impose this incredibly stern punishment on an organisation.”

CV

JAN GOODING

2008 – present

Global operations director, then global inclusion director, Aviva

2013 – present

Trustee, then chair of trustees, Stonewall

2008

Interim marketing director, British Gas

2006 – 2008

Managing partner, Antennae

2003 – 2006

Head of strategic communication, BT

1996 – 2002

Managing partner, BlueDoor

► There are so many myths around diversity that being clever with the data and analysis is essential. For instance, a common assumption is that women are held back in their careers because of taking maternity leave, but – at Aviva – the evidence pointed to discrimination against women beginning at the start of their careers. “The momentum of men being promoted at Aviva – across the group – starts right with going from A, our most junior grade, to B. By the time you get to middle management, the ratio is quite disproportionate. “We begin with more women than men; in middle management, when equal numbers of

“I'm part of the generation that thought all this was going to change because of meritocracy, and it hasn't”

men and women leave, we over-recruit men. So we replace men and women with more men, and then the ratio is unbalanced. When a role is advertised internally, disproportionately more men go for it than women.”

There is so much work to be done in creating diverse workforces across corporations, the market research industry and beyond – but, hopefully, if companies such as Aviva are investing money and resource into it, progress will be made.

“It’s a simple message: acceptance without exception. It’s not about gay people or trans people getting something other people want and don’t have; there’s no hierarchy in it. There are all sorts of different solutions for people to be who they are. That’s all we want – to be ourselves at work.”



GOODING ON MARKET RESEARCH

“As a marketer, research and insight have always been fundamental for me. They help you know where you are and how you got there, then help you to formulate some ideas about what your next steps should be. It’s about being curious and observing what’s going on in the world, and part of it is informal – I’ve always felt it was tremendously important to talk to customers directly.

“It’s almost becoming boring going on about fake news, but it felt particularly important to help support an industry that is trying to provide evidence upon which we can make decisions. There’s never a perfect sample or questionnaire; you can miss things or come to the wrong conclusion. But there is a really powerful, honest intent to get to the bottom of what is going on.

“How do you get people to adjust their habits, review what they think, change their attitudes, do something different? The research industry is a fundamental foundational aspect to our understanding of that. “What is good practice? That’s about the robust dialogue and challenge that goes on – and I think the MRS does a fantastic job of convening that dialogue.”



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In the

Knowing where best to invest marketing spend requires context, precedent and common sense. Marketing mix modelling can be a vital tool for determining return on investment, but the models are not without their limitations. By **Tim Phillips**

Marketing mix modelling (MMM), in which historical data is fed into a model to try to optimise the return on marketing investment, has been a tool for marketers since the early 1990s. In the 2010s, it has created a flourishing sub-discipline: predicting the demise of marketing mix modelling. “To be provocative, I believe it will become obsolete,” said Laura Desmond, then CEO of Starcom MediaVest Group, in 2011.

“If MMM is to survive, it is essential that it change and experience a rebirth,” the editors of *GreenBook* claimed in September 2016. For this article, Michael Wolfe – one of the pioneers of the technique in the 1980s – told *Impact* that he believes the discipline is “in crisis” (see p30, A crisis in MMM?).

Like any statistical tool, MMM can’t please everyone all of the time. There are marketers who can’t learn much of any interest from the available data – for example, if there is a particularly long and complex path to purchase. For others, their market is simply too volatile, or too focused on one aspect of the marketing mix. For digital platforms, competition is increasingly for the market – rather than in the market – so this makes a sophisticated mix model less relevant.

Steven Levy’s book *The Plex*, which tells Google’s early story, reports that when Scott Epstein joined the company as vice-president in 1999, he proposed a marketing plan based on optimising the mix of the ‘four Ps’ – product, place, price and promotion. It was rejected by the founders, and Epstein left the company. A Google

insider dismissed the relevance of marketing mix for a start-up that had market dominance as its goal: “Do we want to put money into the technology, into the infrastructure, into hiring really great people? Or do we want to blow it on a marketing campaign we can’t measure?”

There are also econometric and data-quality limitations for all marketing mix models, which may frustrate clients when they are explained, and give false confidence if they aren’t. Variables in the model affect each other, as well as the outcome that the modeller is trying to predict, making it hard to do accurate ‘what if’ predictions.

“It’s no longer a journey where you see a TV ad and, when you’re in Sainsbury’s, you buy a can of beans. It’s more like: you see a TV ad; you might search for it; you might end up on a brand site; you might have a friend who sent you a video; you might see an ad that you hate and you start complaining about it on social media. There are a lot more paths of communication and of interaction with brands,” says Rob Sander, a principal consultant at Data2Decisions, who is working with digital media owners to build models that capture the role of influencers such as social media.

The data sources can also be hard to mash up into a single model, as they are measured at different levels of granularity – store level, household, individual or segment – and with different frequency and precision. Models compare many types of data that correlate poorly:

mix



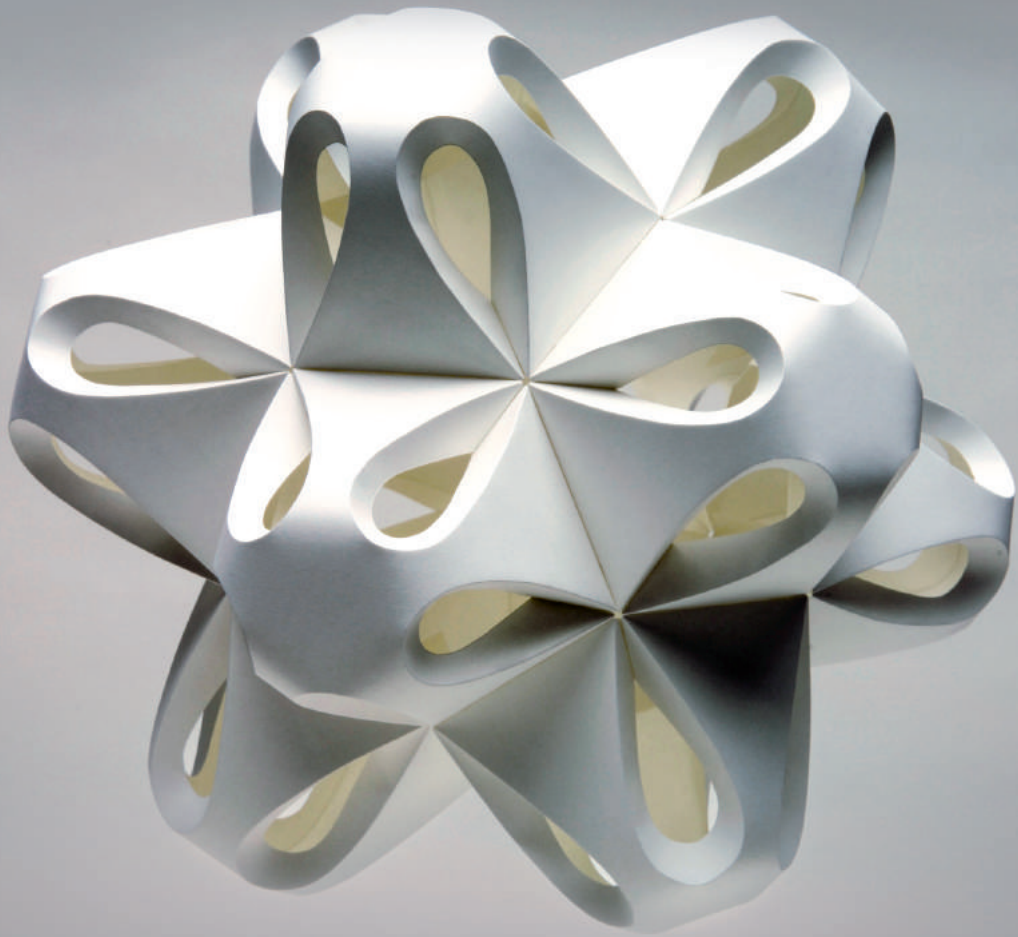
some behavioural, some financial and some attitudinal. This means small changes in the model structure or weight given to each can lead to very different conclusions. A marketing mix model takes months to build, and may use years of data, so it attempts to predict the future using information that might be out of date – or not match the market structure – by the time the modelling process is complete.

Finally, even if the modellers can solve the complex problems of creating a robust model, there is a danger that the process creates a black box that clients struggle to trust. The allocations it predicts could be either a compelling insight demanding action, or a side-effect of the modelling process.

“The results of using this type of data – even if the models are far from perfect – often clearly outperform any other approach”



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MONDELEZ HAS A 3P MIX

"My responsibility is to run marketing mix modelling for all of our chocolate brands in Europe," says Matt Stockbridge, growth analytics manager, Mondelez International. This means he models the marketing for some of our national treasures – not least, the Creme Egg.

The marketing mix models that Nielsen builds for him may take six months to create, and crunch three years of sales and spending data, from the store level upwards – as well as competitor and social media data. But Stockbridge warns that year-on-year consistency and clarity in the model-making process is vital.

This is simplified in his business, because the type of frequently purchased, inexpensive products he analyses respond to changes in a restricted set of marketing strategies: three of the 'Ps' of marketing. "As an FMCG brand, the contributions of distribution [place], price and promotion are between 90% and 95% of our effectiveness. The

contribution of media is still there, but it is much lower," says Stockbridge, who jokes: "I'm envious of people who sell things like cars sometimes."

While his models show that some types of activity have vastly more influence than others, this doesn't mean that nothing changes – or can change – in the marketing mix. On the one hand, Mondelez is keenly aware of the effects of shifts within retail distribution – such as the rise of the discounters. On the other, it knows short-term promotional activity can have a huge habit-forming effect, which is not just immediate.

"We work on the principle that you don't have a long term unless you have a short term," Stockbridge says, "and a £1 deal on a multipack is easy to model."

In some cases, he may build a smaller tactical model that can report effects to the relevant part of the business in a shorter timeframe – with the caveat that the price elasticities and

coefficients that this model spits out can't simply be scaled up to the overall marketing mix.

A lesson that Mondelez has learned in recent years is that – if your sales uplift targets are in six figures, your distribution is more or less everywhere, and your target market is the population of the country – it is easy to be too detailed in the nuances of your models. This was apparent in the early days of social media.

"Like everyone else, a few years ago we got very excited targeting specific groups of people on specific platforms," Stockbridge says. "But we need to create a response of millions of people each time we do something. We need to drive reach and penetration rather than frequency. The idea that we will create an amazing piece of viral content is attractive, but we don't plan for it. So online, our marketing is really about paying for eyeballs."

For that reason, his models tend to be fairly stable year-on-year – there is a trade-off

between trying to measure the evolving complexity of the marketing mix by constant tweaks, and producing results that can be compared across countries and through time. Despite criticism of marketing mix modelling as a discipline, he has found that it has only gained in influence inside Mondelez.

"In the past, Cadbury modelled the effectiveness of its media, rather than what drove its business, but now the approach is to help us make better business decisions. Five years ago, I would not have had a senior marketing person coming to me to say, 'I have £2m to spend, I want £5m back, where should I put it?'

"Results from our models certainly help, internally, to decide debates. We used to face questions from people that doubted whether our numbers were correct, asking 'what about the art?' Now, our marketers understand there are literally millions of historical observations built into our model."

► Given these flaws, why do it? Because, for many brands, the results of using this type of data – even if the models are far from perfect – often clearly outperform any other approach. In a 2013 study published in the *International Journal of Research in Marketing*, Frank Germann *et al* found that marketing analytics created an 8% higher return on assets for the companies that used it, rising to 21% in highly competitive industries, with all sizes of organisation benefiting. If the answer to doubts about accuracy in the modelling process is to increase trust in gut feel, or do the same thing as last year, that isn't palatable to most clients. Which is why, Sanders says, any dissatisfaction with large-scale marketing mix models is not a rejection of the principle of using data to try to optimise marketing.

"It's always exciting to say something's dead," he says.

Other vendors – all of whom offer alternative types of marketing analysis if clients require it – have similarly not noticed a reduction in demand for the models. "We build models for 60% of MediaCom's billings – and the other 40% are, more than likely, building MMMs with another third party. Our clients realise that it's an important way to measure the effectiveness of their advertising budgets," says Matthew Wragg, head of attribution at MediaCom. "Today, this isn't just about finding out how well TV is doing compared to press, but also how this fits into the wider marketing picture – the wider commercial perspective."

"I think marketing mix modelling still has legs," says Nat Greywoode, who works in the market insights and analytics team at Twitter, and who has spent his entire career building marketing mix models. "In my mind, there is no alternative."

While the challenges to MMM's effectiveness are getting more complex, Greywoode's argument is

that techniques to improve the models are known, even if they are not universally implemented yet. The problems of integrating new types of data – especially the social media data that Greywoode is working with modellers to incorporate into their MMMs – are the sort of knotty challenges that, in every industry, inspire econometricians to greatness or drive them to despair. But they are problems with solutions.

How the sausage is made

Statistical models – not just in marketing – create two significant and related problems. The first is that the map is not the territory; every model is a subjective simplification of reality that is built to solve specific problems. "My favourite analogy – the most complete map of the Earth is Earth itself, but a simpler map is much more useful," says Koen Pauwels, a professor of marketing at Özyeğin University, Istanbul, the author of *It's Not the Size of the Data – It's How You Use It*, and a specialist in the theory and practice of modelling the value of marketing.

This means that the modeller will always be trading off simplicity – and transparency – against realism. Experience can suggest how to build a good model, but it cannot offer a definitive guide to every structural decision. Again, like all econometrics, modelling the marketing mix is both an art and a science – and the state of that art is constantly being tweaked and refined. "It's not just a mechanical process of chucking some data into a piece of software, which spits out some numbers that you provide back to the client," says Sanders. "What we try to focus on is building the first stage – then you can make recommendations and have discussions with your client about what the insights may be."

This often leads to a second misconception: that a market mix

model will give definitive answers to every question asked of it. In reality, it can only suggest evidence, based on historical information, that has been measured as accurately as was practical. "You're trying to assist decision-making. Because it is based on numbers, I can see how people jump to the conclusion that it will give a true answer – but there is no true answer," Sanders says.

This is why the teams doing the modelling have learned to be sceptical of surprising results from their prototypes, or radical innovations from newcomers. Wragg says he regrets that a few "cowboys" attempt to catch attention by creating models that seem to show exciting results. "That's a benefit of being in a big team," adds

“ Integrating new types of data is the sort of knotty challenge that inspires econometricians, or drives them to despair ”

Emma Whitehouse, associate director, MediaCom Business Science. "When you get surprising or unexpected results, there's always another client that has probably run something similar. You can look across a group of clients to get some benchmarks, to give you a better feel."

In a recent case, Whitehouse was surprised to find a cinema campaign performing unexpectedly well. She cross-checked with colleagues, and found that similar effects had been seen in other models – but with the proviso that the effects were mostly short-term. That gave her the contextual information to trust the result and present it appropriately.

If using context, precedent and common sense improve modelling – and data quality is fundamental – at least one of those factors may be in short supply. In which case, ►



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› sometimes smaller, cheaper or more generic models are all that is possible. Marketing-mix modelling may not be easy, or even possible, for new entrants to a market or start-ups, which don't have enough historical data to feed the models. In those cases, the client can still rely on the breadth of data that the model builder can access.

Nielsen, which has more depth than most, now offers marketing mix modelling built to solve exactly this problem. Earlier this year, it launched Benchmark Media Optimizer; this is designed to use benchmarks for its custom models as proxies for marketers who want to improve their performance using data, but who don't have data to feed a model. Because MMM uses aggregates, Nielsen's aggregated data – on the returns on marketing investment of 1,600 brands in 30 categories, in more than 40 countries – may improve a client's decision-making, but, as the company admits, it “won't deliver

the breadth and depth of results” of a custom-built model. One constraint might be that a model for a new entrant – as in the Google anecdote mentioned earlier – does not account for the customer's perception of the quality of the product, which may be one of the dominant drivers of growth.

At the other end of the scale, as more marketing becomes data oriented, it may be tempting to throw every piece of marketing data into the mix. It's intuitive that, by doing this, you will end up with a model that captures everything useful – as close to Pauwels' globe-sized map of the Earth as it's possible to get. Unfortunately, econometrics doesn't work this way.

Apart from the time and cost of collecting data, the models are confounded if many of the inputs used are closely related to each other, and all related to the outcome – so it may give exciting, but wildly inaccurate, predictions. If you use the accepted threshold that you are

95% confident something is affecting sales, and you report 20 influences, one or more of them will randomly seem important.

“Just by chance,” Sanders explains, “some things will correlate positively. Then, if you chose to interpret that as an actual causal relationship, you'll say ‘oh, look –

“**MMM may not be easy for new entrants to a market, which don't have enough data to feed the models**”

this tiny thing drove 10% of sales'. You can end up in quite ridiculous situations if you're not careful.”

This limitation – that too much data may sometimes be as big a problem as too little – is driving dissatisfaction in some clients, because their fastest-growing sales channel generates large amounts of

A CRISIS IN MMM?

Since the 1980s, Michael Wolfe has done marketing mix modelling for firms including the Kellogg Company and Kraft Foods. He introduced it to Coca-Cola in the 1990s, and set up Bottom Line Analytics in 2003. His consultancy is 70% based on MMM, but Wolfe has recently become disenchanted with the lack of innovation or rigour in the discipline.

Last year you wrote a blog titled 'The Death of Marketing Mix Modelling'. Why?

Michael Wolfe (MW): In the US, the attitude is becoming increasingly negative towards this tool. They are running the models and not really making decisions from them, because they don't believe the results. I can name three large companies that have ceased using it – maybe not permanently, but at least for the time being. The biggest problem for them is digital attribution. I think there are a lot of larger issues than that, but that is why

companies such as Campbell's Soup have quit doing it.

You said digital attribution isn't the most misleading feature of many models – what is?

MW: That the measure of advertising in the model is only the short-term effect of advertising – so almost all of them show that the return on investment from advertising is negative. If you know Coca-Cola, for example, the long-term effect of advertising for that product in its better years was five or six times the short-term effect. I even did one health and beauty brand last year where the long-term effect of advertising was 20% of total revenue. If you don't measure this effect, why are you running the model?

Have we reached a point where problems such as integrating new data streams mean advanced MMM will only be for a few large clients?

MW: I hope not. When there

were only three TV networks and not a lot of promotion being done, simple models seemed to work OK. But, increasingly, complexity is part of the issue.

You say the voice of the customer is absent from many models. Have you managed to integrate social data?

MW: I've used some linguistic algorithms to turn social media conversations into a group of metrics, which I can sum up in one metric. I've done it 28 times and this metric has an average correlation to sales of about 80%. When I put this into a model, it is a very large contribution to overall revenue. The brand experience in real time is a major driver of almost every business, and it's simply missing from most marketing mix models.

You also claim models do not accurately capture the impact of quality in advertising.

MW: We have partnered with an advertising copy-testing

company, which tests ads that are in market – up to 1,000 every week. I've put these copy tests as a scaler inside my models, and it works. I'm able to decompose the creative portion of the advertising from the investment – and we find about 60% to 80% of the advertising effect is the creative!

Are you optimistic or pessimistic about the future of these models?

MW: It's increasingly becoming a crisis, at least in the US. There's a lot of talk and dissatisfaction from the advertiser world, but it's going to take some fortitude for them to change. It's going to happen when a large advertiser says: 'I'm tired of this. This is the direction we want to go; here are the answers that we need to build into our models.' My optimism is that we know what the issues are. I think I've some of the answers, but there are probably other versions somewhere. I'm not saying I've got a monopoly on the truth, but there are solutions.

data: "The biggest question around MMM at the moment," says Wragg, "is what we do about digital."

The digital challenge

"In the past, networks such as ours – and social media in general – have formed a small percentage of the media budget," says Twitter's Greywoode. "It is growing, but, historically, this hasn't been the case. So the pressure inside brands to come up with an accurate RoI for digital marketing has been a lot less." As digital channels mature, ▶





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he points out, that's changing; clients need hype-free, defensible recommendations.

But digital activity needs careful modelling. For several years, this has been a problem of attribution models, which are the bottom-up equivalent of the top-down MMM. Attribution draws inferences from the brand and product interactions and behaviour of a representative sample of individuals; MMM uses the aggregate behaviour of groups, and attempts to tease out the contribution to the aggregate of each marketing activity.

Both are valid ways to answer different questions, and both have limitations in the questions they can answer. Attribution is often

constricted in that it models only what it knows; for example, it can identify that an online search led to a buying decision, but not always what prompted the search. As search is highly correlated with TV advertising, for instance, switching budget from TV to paid search on the basis of a poor attribution model would be self-defeating. This has occasionally led to unsustainably high RoI predictions for digital channels.

With MMM, the challenge for digital media owners is to work out not just how much they contribute to the success of marketing, but also how the effect works. Twitter is just one such company partnering with model-builders to create sophisticated models that reflect its true place in the marketing mix.

Ideally, improvements in modelling would be a win-win-win, even before brands get involved; digital media owners capture sustainable marketing budgets that represent the true returns on marketing investment, model builders improve their quality, and brands can make better decisions.

Digital is far from a simple challenge for modellers, because



social media often works by catalysing other types of marketing spend. This means that there are collinearity problems – when the return on offline goes up, so does the return on online – and temporal issues; not all the sales effects of digital happen at the same time, so may not be captured in a slice of data. This means that naively adding spend on Facebook, Google search or Twitter to the model without careful thought may decrease that model's ability to predict.

“We've seen not only a direct impact of Twitter exposure on sales, but also an indirect impact. So Twitter kind of influences your customer on to the next step of the journey, which is intuitively understandable,” Greywoode explains. “This is the No 1 area where brands are missing a step, in that they don't tend to look at the stages along the way to a sale. They look at how Twitter exposure equals sales, whereas there are other impacts that would maybe ladder-up to that.”

Neustar MarketShare is another model builder attempting to improve how it treats digital in the marketing mix. It recently partnered with Google, and can offer its clients slightly more granular search data in its marketing mix models.

A recent example of how this data could be used was a benchmark analysis on the respective contributions of television, digital, video, social media, search and other forms of advertising as an influencer of sales for action films. It found that TV was the most effective influencer, but it swallows 82% of marketing budgets, so is over-invested. On the other hand, increasing digital investment from 10% to 34% of marketing budget would improve ROI for distributors.

In other areas, Neustar MarketShare predicts where the influence of digital on sales has been hyped – and then its models may also dampen expectations, it admits.

Dirk Beyer, vice-president of data science research, doesn't try to pretend that modelling digital's influence is easy. “Paid search, for example, is highly correlated to who is in the market, or how many people are in the market for your product at a given time,” he says. “It's highly correlated to seasonality, to the hype that's around the product, and so on. If you just throw in paid search as a single variable in a monolithic model, it will look like everything you do has been driven by paid search.

“We're now in a position where we get that data directly from Google, at a level of granularity that is exactly what our brands need. That allows us to do a much better job teasing out the actual impact of search versus – for example – the upstream advertising that got people to the point where

“ The difficulties of working with digital data should not cause clients to abandon their models ”

they started searching. That's a big deal for our clients.”

The difficulties of working with digital data should not cause clients to abandon their models, Sanders says – just to question the providers about how digital has been integrated. He also argues that it's not a reason to abandon this type of modelling, because these are the type of econometric challenges that model builders such as IRI (see p34, More than one tool) have been facing for years.

It has similarities to the way models face the challenge of splitting the immediate sales effect of advertising from its long-term brand-building effect (see p30, A crisis in MMM?), or the interaction between advertising and promotion. ▶

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► “It is interesting to compare how something like Twitter or Facebook works compared with TV, press or out of home. Actually, we have found they are quite similar,” Sanders says.

“There would be a danger if you obsess about measuring Facebook or Twitter’s RoI, and you change your model in other ways to make that happen. Then you’ve probably just built a bad model.”

A better model

The solution to building the best possible marketing mix models may sometimes lie outside the models themselves. With new data sources that interact with each other, markets that evolve, and the need for rapid decision-making, creating a monolithic piece of software that answers every marketing budget question (until machine learning and artificial intelligence can replace

econometricians) may not always suit the commercial imperative that created MMM in the first place.

In that case, MMM may become a toolbox of methods, rather than one model, designed to answer a range of questions in a coherent way.

The first challenge is how to model smaller customer segments using MMM. While large FMCG brands such as Mondelez (see p28, Mondelez has a 3P mix) do not use MMM for this, other clients do. IRI, for example, is creating models that can capture the returns in increasingly small segments – but granularity of data is a constraint.

“MMM is a top-down, aggregated viewpoint,” says Wragg. “And with only so many data points, there are small channels that we have, historically, not spent lots of money on, or don’t reach millions of people – so we sometimes struggle,

statistically, to pull those factors out of the models.” For such models, he suggests, attribution – enhanced to capture the impact of non-digital spend – may sometimes produce more actionable insight.

At Data2Decisions, a strand of research focuses on how to combine the top-down and bottom-up

“MMM may become a toolbox of methods, rather than one model, designed to answer a range of questions”

approaches, in what Sanders calls an “ecosystem” model. “It’s the same kind of metrics, but we just broaden out the scope of our analysis. Rather than simply building a model of

MORE THAN ONE TOOL

Rather than build a marketing-mix model that tries to solve all problems, some providers are focusing on how to complement it with other tools. We asked Carl Carter, head of media and connected consumer in Client Growth Delivered, part of IRI Worldwide, how this works.

Do you recognise the broad criticisms of MMM?

Carl Carter (CC): Marketing-mix models give a very complete and comprehensive picture of marketing performance, but they do have shortcomings. The breadth of measurement across all demand drivers creates an intensive process – but in the high-frequency, rapid cycles of digital campaigns, clients often need insights in days, rather than weeks and months. Digital is typically measured at aggregate platform level, without measuring executional mix, including publishers, creative and content genres. And campaigns that have a niche targeting – for example affluent millennials – are not measured accurately; their impacts are washed out in the aggregation process.

How have you approached these problems?

CC: We have developed methodologies around A/B testing using stores and consumers, as well as variations of attribution models – including reattribution models. It lets us go faster and deeper, and address the detail in targeted campaigns.

How does A/B testing work in this context?

CC: Using the simple approach of exposed versus non-exposed, we can apply this methodology to our store data, treating each store as the proxy for sales response to media, using purchase data. We can use this to test creative, format, placement and publisher, and insights are delivered in less than two weeks. This analysis is flexible too: some clients use this for testing before large-scale media investments; others employ it as part of a continual measurement of digital campaigns. We have also begun to integrate the findings alongside marketing mix. This provides calibration for the marketing-mix analysis.

What are reattribution models?

CC: They use a secondary regression to understand the relationships between various marketing touchpoints measured within the marketing-mix analysis. Using this approach, we are delivering some very complex insights for digital – using core marketing-mix principles – but much faster.

Digital advertising has made attribution models more attractive, leading to criticism that MMM’s aggregated data throws away useful data.

CC: MMM is often criticised for being too macro, but this is often self-imposed. For instance, IRI builds store-level mix models and pushes marketing data as far down as possible to match this level of consumption. Not matching down to individual households or consumers is what permits MMM to measure across all the marketing levers, including offline. Marketing mix can have a bad rap purely because the data that feeds the model isn’t at the level of granularity to push the model to its limitations.

How do the restrictions on the data that platforms such as Facebook provide affect the power of MMM?

CC: Often, you can find that digital content owners and ad networks operate in ‘walled gardens’ that do not permit integration of data with other networks – which is understandable because of privacy or competitive restrictions of the data. Walled gardens are not an issue for MMM, as consumer segment is the lowest it goes down to. Combining store-level data, causal effects and the most granular media data, marketing mix is still very powerful. We are also seeing media owners offer increased granularity of data for more detailed analysis.

What’s the future for these marketing mix models at IRI?

CC: Marketing mix requires some support to improve granularity and speed of turnaround. We think the only effective way to deliver this is an integrated measurement strategy, in which it is complemented and supported by a range of methodologies.



sales, we'll also build a model of each of the digital touchpoints, which will typically be things such as search volume, the website and social pages. There are a lot more paths of communication and paths of interaction with brands. It's the interaction between the different media and touchpoints."

Having modelled the relative



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influences of those touchpoints, the output can then be fed back into the marketing-mix model to improve its recommendations.

Increasingly, marketing-mix models may also take advantage of natural, or planned, experiments. Correlation between an input and a key performance indicator (KPI) of a model – such as social media

“ Ultimately, the test of a model is how effective it is at helping the client to make better decisions ”

sharing and sales – might be causal; the more people share, the higher your sales will be. Or both might be caused by a third factor – such as TV advertising. Finding two sets of data for which the main difference is that one group was exposed to TV advertising and the other was not would settle the argument.

Brave clients may even decide to run an experiment to test model predictions – an approach recommended by Pauwels when he

builds models for his clients. “Individuals and organisations need to experiment to figure out what really works for them. Unfortunately, experiments on a large scale are often considered costly, risky for one’s career, and tough to sell, politically, in the organisation,” he says. “Who wants to be in the ‘control group’ for a potentially very successful new marketing initiative?”

Pauwels built a model for an office-furniture company, which then decided to settle the question of causality by running a field experiment, which divided the market into two groups. One group doubled the spend on what was predicted to be the most effective channel, funded by cutting the least effective one in half.

“Profit, net of marketing, increased 14 fold in the experimental group versus the control. After the experiment, we again modelled the data and showed the company should stop reducing the least-effective action, but it still had room to increase the more effective one,” he explains. Pauwels calls the approach MEME – model, experiment, model, experiment.

Ultimately, though, the test of a model isn’t just how accurate it is – it’s how effective it is at helping the client to make better decisions.

Increasing complexity isn’t always the way to go; creating the structure to answer precise questions will achieve better results than simply adding more data, says Pauwels, who might use the output of one model to decide how to build the next stage.

“Senior managers often ask me to evaluate the marketing allocation among communication channels. For this purpose, I would not include information on the specific campaigns within each channel. Next, I may build a model that distinguishes the separate effect of TV campaigns, treating the other marketing channels as control variables. Then these smaller models can fit into bigger models.”

“At the end of the day,” Greywoode adds, “MMM is a bet. It’s hopefully as good as you possibly can get. Clients should challenge their vendors to make the models as representative as possible, but – once they are satisfied with that – focus more on the uses and measuring the outcomes.”

MEASURING TWITTER: FOUR TOP TIPS

Twitter is committed to helping marketers measure the impact of their advertising on the platform.

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Twitter’s marketing-mix modelling (MMM) programme is an established part of the Action pillar, supporting our largest global brands in their RoI measurement efforts and supplying tactical insights to help improve their activity on Twitter.

To date, we have partnered with more than 30 brands, in five markets and sectors, achieving impressive returns of around 2x investment on average.

In all these partnerships, we have worked with the client’s preferred MMM agency and some of the best practitioners in the industry, who have helped guide and evolve our point of view on how Twitter – and social channels at large – should be measured within MMM.

Here are the top four things we have learned from measuring Twitter through marketing mix models:

1. Data is king – MMM agencies that collect impressions, views and engagement from Twitter sources, and include them as their data

inputs, were able to achieve more accurate and insightful results on Twitter performance for their clients.

2. Product and platform changes – Twitter’s ad offering has changed significantly over the past two years – particularly in the advent of new video products – which is often overlooked by reporting a single Twitter RoI figure. Best-practice models included multiple Twitter input variables to capture different executions and changes over time.

3. Consider the power of organic tweets – For some brands, driving incremental consumer tweets and engagement as a result of their advertising activities is a significant outcome in itself, and can be a

meaningful amplifier of their bottom-line KPI. Some agencies took steps to identify the importance of this for their client and included additional inputs to reflect this in models, alongside paid Twitter activity.

4. Keep in mind the objective – Agencies that clearly understood what their client’s Twitter activity was trying to achieve were able to set up the analysis to extract the most value for their models. In these cases, models were modified to include Twitter advertising’s influence on brand health metrics, as well as intermediary outcomes, such as search volumes and website visits.

By Nat Greywoode, market insights & analytics, Twitter



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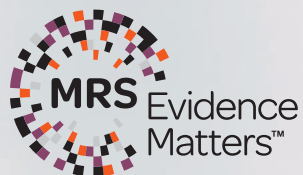
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A FOOTBALL FOCUS



One in five adults participates in football in some form, and understanding the behaviours, needs and values of these players, coaches and supporters falls on the shoulders of **Ross Antrobus** and his insight team. *Jane Bainbridge* reports

The walk to the Football Association's (FA's) offices is nothing if not inspiring. Even without match-day crowds, striding along Olympic Way from the tube station, with Wembley Stadium's majestic arch before you, is an impressive sight. It's not a bad way to start your day.

As head of research and insight at The FA, Ross Antrobus's offices are inside the stadium, and our interview is taking place in one of the boxes, overlooking the pitch. If Antrobus didn't exactly live and breathe football before – he admits to being only an armchair West Ham fan – he does now.

Indeed, he has one of those roles that I suspect many a market researcher would clamour for, because – when he first joined the organisation – there was no insight division. So he has not only championed the value of insight within the business, but also built his team from scratch. And the quality and importance of the work that this group of five researchers (including himself) has done was good enough to win them Best In-house Team at last year's MRS Research Live awards.

So it's interesting that, although Antrobus has a degree in sports psychology, applying for the FA job was a bit of a whim, rather than a burning ambition. But with a background in FMCG market research and then marketing, at Müller – as well as agency-side retail insight jobs – he has been able to bring a specific insight rigour to the role.

"The key to being really good at insight is understanding how the organisation makes money and where it spends money. If you have a good grasp of that, it helps you frame all your work," he says.

Now in his fourth football season, Antrobus has lived through a change of CEO – from Alex Horne, who recruited him, to Martin Glenn. So what made the FA realise it needed its own in-house research team? "It was twofold really. We were under increasing

scrutiny and pressure from Sport England and the Department for Culture, Media and Sport (DCMS) as we were losing weekly participants and had no understanding of why; Sport England figures give you a measure of performance, but no diagnosis.

"The other side is Club Wembley – 18,000 seats held by about 5,500 people [individuals, companies, travel agencies]. Club Wembley seats were sold on a 10-year licence. When I joined, we were four years away from what was then our single biggest revenue source reaching the end of its tenure. Club Wembley is worth about £60m of revenue a season.

"It was a very broad brief when I joined – we need to know more about participation; we have to make sure we know everything we need to get as many people as possible to renew their Club Wembley membership; here's some budget. My first two weeks were spent scoping out what the role and the remit of the team was, and then what those job profiles looked like."

Since Glenn took over, more focus has shifted onto The FA's brand image. "It's a funny brand in that it's well recognised and not at all understood – and I don't think there are many brands that fit that category."

Antrobus says that, with more traditional brands, it's easy to understand where the brand starts and stops, but with The FA, "our brand doesn't have any edges".

"People know where Starbucks starts and stops. People know what we do, but it merges into what the Premier League does, what Sky Sports does, what the government does; so we lack definition. We know from work we've done around The FA image that we're seen as slow and not very transparent. The previous chairman used the expression 'pale, male and stale'."

Antrobus identifies three things that change The FA's brand image: "The performance of the men's senior team; the employment status of the England manager; and how we're seen to handle high-profile discipline issues in the professional game."



CV
ROSS
ANTROBUS

2015 – now
Head of research and insight, FA

2013 – 2015
Head of customer insight, FA

2011 – 2013
Research director, Freshminds

2010 – 2011
Account director, Nunwood Consulting

2008 – 2010
Account director, Kantar Millward Brown

2006 – 2008
Marketing manager, Müller

2004 – 2006
Insight manager, Müller Dairy



ABOVE Former England captain Casey Stoney reveals what football means to her in a video released by The FA as part of its 'For All' campaign

► "They're all within our remit to some extent. But what doesn't come through is that in the last football season we reinvested £1m a week in grassroots football," he explains.

The FA is in the first year of a four-year strategy to rebuild itself into a world-class organisation. This year, it launched its 'For All' campaign, which includes two films – one featuring Casey Stoney, who has more than 100 caps for England Women, and the other starring James Blackwell, captain of the Paralympics GB team. They tell how football has affected and improved their lives.

"The more people know about us the more positively they think about us. That's not rocket science, but I don't think it applies as drastically to other brands as it does to us," says Antrobus.

The choice of Stoney for one of the films is deliberate. Women's football has been a particular focus for The FA and its ambition is to double the number of women and girls playing football by 2020 – which means going from 6,000 to 12,000 teams.

The cynic might say this is an easy way to increase participation, but Antrobus points out

how challenging it is 'to double it in four years'. Although women's football has been around for a long time – women's clubs existed in the 1890s, but the Women's FA (WFA) was only affiliated with the FA in 1983.

The growing awareness of the national women's team is certainly helping uptake, but reaching girls when they are young is vital. According to research, if a girl has not got the football habit by the time she is eight, then she's not going to get it. "About 90% of boys over the age of six play football; with girls, it's just below 20%. But by the time girls get to 16, that's dropped to nearly 5%. Even with boys, it's dropped to 66%," Antrobus says.

The team spent time with girls playing football to help with the FA's women and girls strategy and one of the interesting insights that came out of its qualitative work – with digital insight and strategy agency Sparkler – was around parental involvement. "A dad with a daughter is just as likely to encourage her to play football as he is with a son, but he is more likely to be involved in their football – as a coach or volunteer – with a son than a daughter.



He's no less encouraging, but he's not particularly involved."

This year, the insight team has also spent a lot of time working on The FA's new football hubs, to try to understand the localised social and economic impact of football.

"Over the next five years, we are building about 150 football hubs. They have a working title of Parklife – the first one opened in Sheffield," explains Antrobus.

With government cuts, the pressure on councils' spending has increased and, as Sheffield didn't have enough money to maintain and keep its football fields, The FA worked with it to find a solution.

"Rather than try to maintain grass pitches all over Sheffield, we are building three football hubs, which are centralised facilities. Regardless of which club they play for, people come to the hubs and play. It's far more cost-effective."

Others are following Sheffield; The FA is about to start building in Liverpool, initial stages have started in Ealing, west London, and there are expressions of interest for others across the country. "We want to learn as we go along, and

understand what impact they are having on the local community," says Antrobus.

To capture data, the hubs have one entrance. "It's like going to the gym – everyone has to swipe in. It's a long way from arriving two minutes before kick-off, throwing on your kit and running on," Antrobus adds.

"We'll know who you are and who you play for. We'll know what games are being played, so we can start to look at your frequency of use. The cards are also used when people buy things, so we can get an idea of use of the site.

"We don't ask for a lot of information from people, but we ask for their home postcode so we can look at catchment areas, to help us work out travel times. Then we can identify how far away from Sheffield the next hub needs to be.

"With Sport England, we are asking 'does it help in the locality? With engaging young people in activity? Does it help with localised crime and vandalism?' For older participants – whether it's through walking football or small-sided football [such as five-a-side] – we are looking at what impact it is having on their health and wellbeing."

ABOVE Research suggests that if girls haven't got the football habit by the time they are eight years old, they are unlikely ever to take up the sport



- ▶ But for all the highs of new football hubs or success for the England Lionesses, there are the lows of errant England managers – and, in 2016, The FA suffered a new low when *The Guardian* broke the story of historic child abuse by a football coach, which quickly escalated,

BIG BLOCK OF CHEESE DAY

Earlier this year, The FA's research and insight team invited research agencies that it wasn't currently working with to pitch. The inspiration for the two days of back-to-back introductions was the US political drama *The West Wing*. In it, the President has a Big Block of Cheese Day, when senior staff have face-to-face meetings with organisations that struggle to get a politician's attention.

"We get excellent work from our agencies, but – not being agency-side any more – I wanted to make sure we weren't missing out on anything," says Antrobus. He adopted the Big Block of Cheese Day format to make it more interesting, and publicised the event in the business press. He whittled down 103 agencies that applied to 24 by looking at their credentials and websites.

"Each agency had half an hour to present, answering two mandatory questions and one other from a choice of three – with no promise of guaranteed work, and no real project brief," he says.

"We ran two rooms over two days, and a session started every hour. Depending on which agency was in which room, we had a very well-organised rota of who was where."

Antrobus met agencies specialising in – among other things – ethnographics, behavioural science, analytics and big data, and qual. He says it was worth doing, although no-one blew him away with their answer to his killer question: 'What are we missing out on by not working with you?' However, Antrobus has already worked with one of the agencies that pitched video ideas.

with increasing numbers of victims coming forward and more clubs affected.


Initially, the research and insight team wasn't involved, but now Antrobus is surveying safeguarding officers within football clubs. "The work is to understand how we can ensure even more support in place for the people who are in charge of keeping children safe in football. So when that project goes live, we will write a press release to say, 'We are doing our market research.' Otherwise, there is the potential for it to appear in parts of the press as 'Worried FA officials seek to canvas opinion on safeguarding officers'."

As well as juggling these projects, there is ongoing research work. Toluna does a monthly participation tracking study, which talks to 1,500 people in England, while more regular insight work is handled by Incite and 2CV.

But Antrobus's team sits within the strategy and comms team, and football generates more than its fair share of news – "the only thing that generates more column inches than football is the royal family".

"We work quite closely with the comms team. There are a lot of myths, plus hearsay and anecdotal stories in football; in many cases, we can disprove – or at least supply data and insight to debunk – some of those myths."

The anecdotal benefits of playing football, in all its guises, may be strong, but DCMS requires data to prove its value – be it economic or social – and that will continue to keep Antrobus and his team busy. ■



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At Paddy Power Betfair, 5,000 people counts as a qualitative sample. **Katherine Feres**, the company's head of market data and insight, talks to *Bronwen Morgan* about how she's working to persuade executives of the power of small samples

Gathering a sample of gamblers can be challenging. Just 16% of the UK adult population have placed a bet in the past 12 months, and only 7% do so on a monthly basis, according to Katherine Feres, head of market data and insight at betting group Paddy Power Betfair.

Feres is one of those 16%, but can only count herself among them since she started at the company in 2013. "I wasn't a gambler before I

joined Paddy Power Betfair but, for me, whatever category you work in you have to experience it as a customer – so now I dabble in gambling from time to time."

Feres joined Paddy Power from Procter & Gamble, where she had worked in consumer and market knowledge roles across several divisions, including oral care, feminine care, fragrances and skin care. In February 2016, just two years after she joined, Paddy Power merged with Betfair – but this, and the fact that she had no prior experience of the gambling world, did not feel like a challenge to Feres, thanks to the regular changes in assignments she had at Procter & Gamble.

"Fundamentally, what you are looking for is to understand who your customers are – understand their unmet needs and how you can better deliver products," she says. "Whether that's in gambling or oral care, the approaches you take don't change that much."

This helps in the case of Paddy Power Betfair, because the customer types from each side of the business are quite different. Betfair clients, explains Feres, are "more sophisticated betters".

As a proposition, Betfair has two parts: a traditional sports book that operates in the

ABOVE Paddy Power's Hollywood-style sign looms high above Cheltenham racecourse

“Whatever category you work in you have to experience it as a customer – so now I dabble in gambling from time to time”

same way as Paddy Power, and a betting exchange, which is where its business began. The betting exchange appeals to a more knowledgeable gambler because they, effectively, become the bookmaker. They also place much higher importance on getting the best prices and maximising their returns.

Paddy Power customers, on the other hand, tend to be driven by value; are more casual, social betters; and are more likely to be betting on horse racing. The fact that Paddy Power has retail stores – which Betfair doesn't – adds to the social element of their custom.

Most Paddy Power customers are also fairly fickle when it comes to loyalty, says Feres. The industry is very promotion-driven and customers will, on average, have three accounts online. This means their key motivators will be ease of use and convenience – they tend to bet using whichever account has money in it at that moment.

“You can offer them lots of other things, but is that going to motivate them to make a deposit in another account? Probably not,” Feres says. “So it is incredibly challenging to encourage customers to be loyal.”

The other important thing to consider is that – because of responsible gambling – every employee is very conscious that they shouldn't be encouraging people to gamble more.

“For us, our approach has to be: within the wallet that someone has decided to allocate to gambling, how do we ensure they

bet that with us, without encouraging them to spend more?”

One of the ways Paddy Power Betfair has differentiated itself is through its advertising and marketing stunts, which have never shied away from controversy.

For example, Paddy Power was responsible for the UK's most complained-about advert of 2002. It featured two elderly ladies crossing the road – with a car fast approaching – accompanied by the headline ‘Let's make things more interesting' and odds bubbles displayed next to them. Paddy Power claimed they were odds on who would get across the road first, and not on who would be run over.

In 2010, the company was forced to remove a Hollywood-style Paddy Power sign that it had put up on a hill overlooking Cheltenham racecourse. At 270ft wide and 50ft tall, it was bigger than the original Hollywood sign.

Then, in 2012, Denmark striker Nicklas Bendtner was banned for one match and fined £80,000 for flashing the Paddy Power-sponsored waistband of his underpants while celebrating a goal at the European Football Championship. Feres says this heritage of disruption was something that attracted her to work at Paddy Power in the first place.

“I would say the marketing team here is world class in terms of the industry,” she says. “Even just in terms of cutting through, Paddy Power is head and shoulders above the rest of the gambling companies.

CV
KATHERINE
FERES

May 2016 – present
Head of market data and insight, Paddy Power Betfair

Jul 2015 – Apr 2016
Senior insight manager within commercial team, Paddy Power

Nov 2013 – Jun 2015
Senior insights manager within marketing team, Paddy Power

Feb 2009 – Oct 2013
Consumer & market knowledge manager, Procter & Gamble

Feb 2007 – Jan 2009
Consumer & market knowledge associate manager, Procter & Gamble

Sep 2005 – Jan 2007
Research executive, Research International

BELOW Paddy Power ambushed the 2012 Ryder Cup golf with sky tweets ▶



“The marketing team here is world class. Paddy Power is head and shoulders above the rest of the gambling companies. When you ask customers if they remember seeing any advertising recently, Paddy Power is always the brand that is mentioned”

- ▶ “When you do qualitative research and ask customers if they remember seeing any advertising recently, Paddy Power is always the brand that is mentioned.

“And people will often play back specifics of adverts that they remember – ads that are now eight or 10 years old, but they’re the things that stick in people’s minds.”

Since the merger of Paddy Power and Betfair, insight has been at the very front of mind for the executives, says Feres. The first project her

team worked on was around what the dual brand strategy should be. “Day one of the merger and the question is: what do we do with our brand?”

Now, that question is more focused on how to tailor the overall proposition to the two customer types. The company is moving to one technology platform for both brands this year, so Feres and her team are working on understanding the targets for the different brands, which products should be offered to each, and how best to tailor them.

The other key strand of work is that as Betfair is expanding internationally, they are assessing the opportunity of new markets and how to launch successfully.

Being thrown into the deep end with these high-profile projects has put the team in a great position to showcase its capabilities, says Feres. And the sheer scale of the business – since the merger, it’s a FTSE 100 company – means it is effectively starting from scratch when it comes to insight.

“Paddy Power had been on a bit of a journey to discover where insight fits best,” Feres says.

BELOW Paddy Power's 2014 Brazil World Cup message caused an outcry, until it was revealed that the photo was mocked up





“When I first joined, there were pockets of insight across the business. I went into the marketing team, and there was a customer intelligence team, a UX [user experience] team and retail analysts. Basically, lots of different people working towards the same goal.

“We had made a first attempt at centralising that prior to the merger, but it went a step further, post-merger, to bring together everyone who had more of an analytics focus.”

The central strategy and insights organisation at Paddy Power Betfair is now comprised of three pillars: market data and insight (which Feres leads); strategy; and data enablement.

Feres’s market data and insight team is made up of two halves: insight – which covers the more traditional market research side of things – and a market competitor team, which is very externally focused. This team is responsible for gauging market share, sizing and projections – as well as monitoring industry press and financial updates. The two sides are then brought together to give a holistic picture.

“We don’t just let the research operate in isolation, but combine the two,” says Feres.

Meanwhile, the strategy team is made up of people who have worked across the business and so are familiar with the operational side of things. This makes them more able to put recommendations in place, using the data provided by Feres’s team.

Finally, the data-enablement team looks into automating processes, making data more accessible, and getting results into dashboards that colleagues can access without having to consult Feres’s team. And the stakeholders across Paddy Power Betfair, Feres says, are more capable of getting involved in data sets than

most other non-research stakeholders.

“We’re quite an unusual bunch in that, because we’re a gambling company, the vast majority of people who work here are highly numerate. So when we get new research partners on board and we’re doing the debrief, they [the agency] will be trying to simplify everything, and I have to tell them they’ll have no credibility with our stakeholders if they do that. Sure enough, usually by the second slide, somebody from our side will want to get into the in-depth workings of whatever model is being presented.

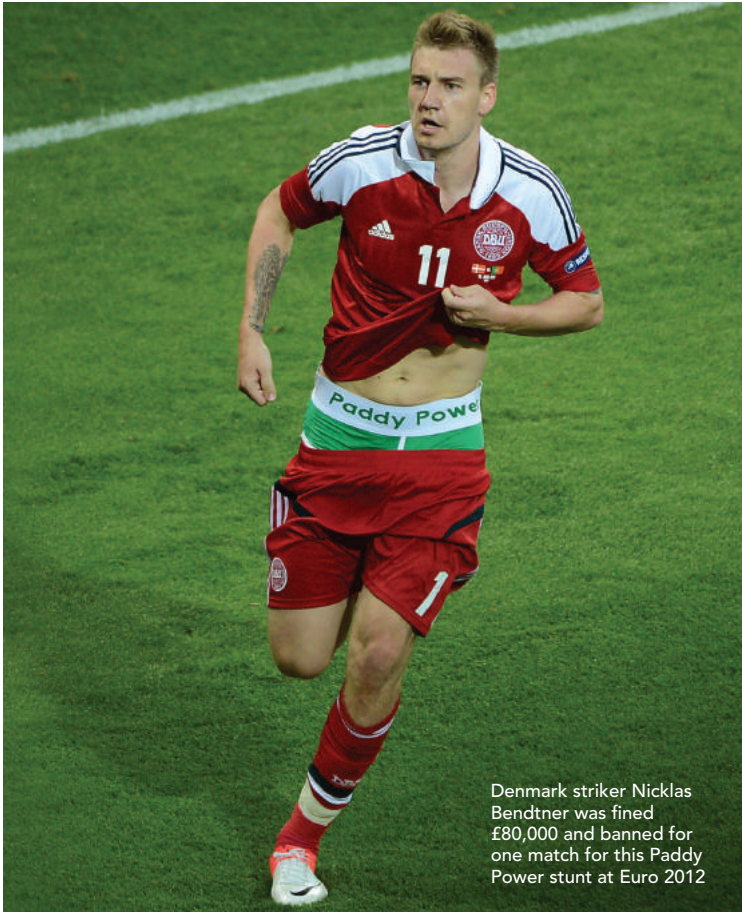
“I think it’s good as an insight team, because it really pushes us to make sure we are at the top of our game. It pushes us to be better.”

One challenge that comes with this thirst for data, says Feres, is convincing some stakeholders of the benefits of qualitative research, and reassuring them that it isn’t intended to replace the “good hard quant data” that they feel comfortable with.

“Those who work with our transactional data will always refer to our quantitative research ▶

ABOVE Paddy Power ran an advert featuring a Euro 2016 Anthem for Scotland – even though the Scots did not qualify!

“We’re quite an unusual bunch in that the vast majority of people who work here are highly numerate. So when we get new research partners on board, the agency will be trying to simplify everything, and I have to tell them they’ll have no credibility with our stakeholders if they do that”



Denmark striker Nicklas Bendtner was fined £80,000 and banned for one match for this Paddy Power stunt at Euro 2012

studies as ‘qual’ – for them, it’s qualitative data because it’s not being done with hundreds of thousands of people,” she says. While Feres might “get away with a sample of 5,000”, her stakeholders tend to prefer one closer to 10,000.

“We’re helping them understand that they can get as much out of talking to 10 people as looking at what 100,000 people have done.”

Feres is confident that she and her team have demonstrated there is room for both types of thinking, and that the company will get to a better place because of it.

One of the demonstrable benefits of the work they have done has been helping Paddy Power Betfair employees ensure they are thinking of the customers’ needs.

“A lot of people within the company gamble themselves, so they might not always come at it from a customer perspective – they’re coming at it from a personal point of view, and I think that’s a dangerous place to be,” Feres says.

To tackle this, the company runs regular sessions called ‘Pints with punters’ [see panel]. These involve going to the pub with a group of customers and a group of stakeholders, and chatting about whatever topics are pertinent to the business.

“This makes sure that, when people come back to the office, the customer is front of mind, rather than people making decisions based on their own judgement.” ■

PINTS WITH PUNTERS

Run in a ‘speed dating’ style – in a pub setting, in an effort to “get us out of the focus-group facility and into a place where it’s just a more natural conversation,” says Feres – pairs of stakeholders from Paddy Power sit with pairs of customers for six minutes of conversation. After their time together, the pairs swap around.

While there will be a researcher present to run the session, the stakeholders are typically from across other areas of Paddy Power.

“There will always be pockets of the business that have questions, but they’ll never be quite high priority enough to get their own

dedicated research to answer them – or they don’t have the budget,” says Feres.

“Pints with punters is a really cost-effective way for us to get answers to some of the questions that would otherwise go unanswered.”

The reason that this approach works so well for Paddy Power, Feres explains, is that a lot of what they discuss with customers involves sport, which people are incredibly passionate about.

“You can put two guys next to each other who’ve never met, put them in front of a football match and they’ll strike up conversation.

“So we also use live football games as a sort of starting point, where we can show the products live, as well as get that in-the-moment feedback.”

The sessions are run quarterly for Paddy Power’s online and retail businesses in the UK and Ireland, with a total of eight every year. For the first time, the team is about to roll out the approach internationally.

The concept will have to be adapted for use overseas, so the team will take guidance from local country managers and research agencies on the kind of setting that works best to encourage the natural conversation they are looking for.

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Ah, the sweet smell of success. Did you know that being an innovator in sensorial experiences can be big business? Very big business. For 2016, US-headquartered International Flavors and Fragrances (IFF) posted full-year net sales of more than \$3.1bn – a figure not to be sniffed at, if you’ll excuse the pun. There are plenty of dollars to be made out of scents.

IFF, which has 7,300 employees and operates in 35 countries, is divided into two main business units – unsurprisingly, flavours and fragrances. The latter generates a slightly higher proportion of overall revenue and is split into two businesses: fine fragrances and consumer fragrances. Fine fragrances is focused on the perfumery market, whereas consumer fragrances works with FMCG companies – such as Procter & Gamble, Unilever and Henkel – in categories including fabric, hair and home care, developing fragrances for high-volume products such as detergents, shampoos, shower gels and air fresheners.

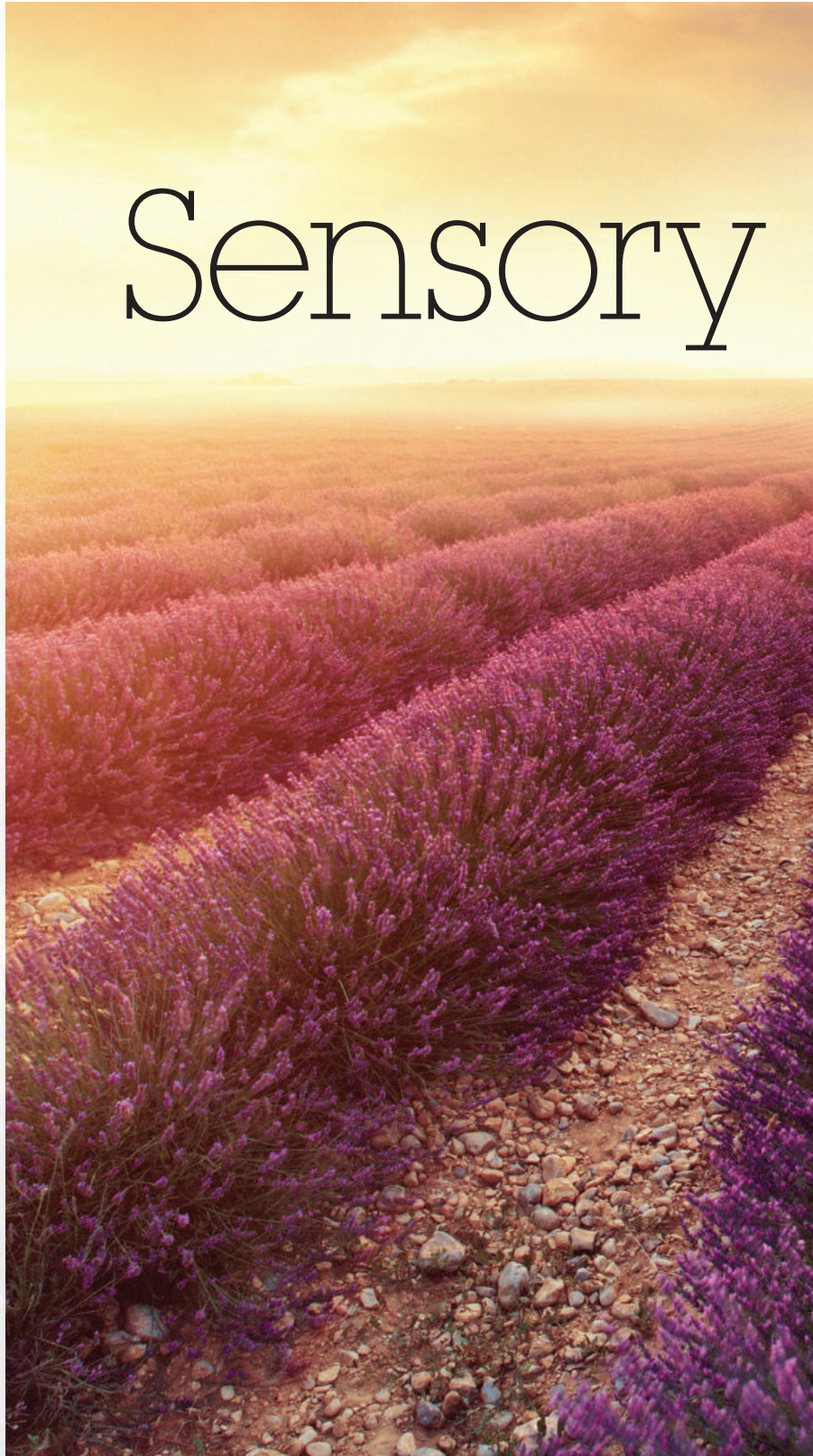
“We are very serious about insights,” says IFF’s global head of insight, Stan Knoops. “We have training in place for everyone in the IFF organisation, so they know what an insight is – and we build our insights very specifically. Each should have three parts: facts – what is it?; what is new – what did you not know before?; and finally, there should be an action.”

That insights should be actionable is something of a mantra for Knoops, and IFF is a business that does far more than pay lip service to this approach. The main insights collected from each study are fed into a database to which everyone in the business has access. This “powerful” resource is used for making decisions – some of them highly significant from a business strategy perspective, such as whether to build or close a factory.

Consumer connects

Consumer insight lies at the heart of IFF and is not seen as the responsibility of the research specialists alone. The consumer insight team organises ‘consumer connects’ for everyone

Sensory





overload

Consumer insight and research drives business strategy and innovation at International Flavors and Fragrances (IFF) in its quest to create sensory experiences across product categories for consumers. Rob Gray speaks to its global head of insight, **Stan Knoops**

within the business. This means that – once or twice a year – every member of staff engages with different consumers, to make sure everyone has their best interests in mind.

“IFF is very focused on consumers,” says Knoops. “I don’t think every fragrance house does the same. You could say let’s focus on our customers or the supply-chain part of it. But we really want to make sure we develop fragrances that consumers love. That is a pretty big statement and we need to make sure we follow up on it.”

Having taken the trouble to expose its employees to consumers and their needs, IFF makes certain this feeds into the innovation process. It runs an internal website called Alchemy, through which employees can share insights and “submit a seed, or the start of something new”.

Suggestions are taken forward through online collaboration. A review of ideas on the site takes place every three months. Resource is then committed to progress the best one or two ideas each quarter, with the aim of developing them into a new fragrance.

Knoops, a Dutch national with a Master’s degree in sensory research, first came to IFF in 2002. However, from 2008, he spent six years away, working for one of the company’s biggest clients, Unilever, on global research projects on the interface between marketing and R&D, building the consumer insight team there from six people to more than 25.

Since his return, Knoops has been based in the Netherlands, which is home to the IFF centre of excellence for fabric. The company has a devolved structure for its centres of excellence: personal wash is based in Singapore, home care in the US, and beauty care in France. There are also consumer insight teams for regions such as Latin America.

Fragrance trends

Around 35 people work in consumer insight for IFF globally, but there is also a 10-strong consumer science team and a strategic insight team of four, which is more focused on the long-term future. Knoops and his team collaborate with these departments when and where appropriate, often briefing the consumer science team on innovations to explore. Discoveries are also shared with the fine fragrances and flavours units of IFF. ▶

► “It’s interesting to see what fragrance trends are being developed in fine fragrance that can travel to consumer fragrances – and the other way around. But the teams are separate.

“Maybe even more important is the collaboration with the flavour business, especially in new technologies or innovation, which could be very interesting in flavours and fragrances. One area where you see a big overlap is in toothpaste. Freshness of toothpaste – is that a flavour or is that a fragrance? There are lots of learnings.”

Olfactive notes

The science behind this should not be overlooked – and there are business implications attached to the scientific decisions made. Take detergents, for example. Not only can IFF design fragrances that are stronger or that possess “specific olfactive notes” that consumers respond to, but it can also create fabric fragrances that work more efficiently for different types of clothes. “We can even design a fragrance that sticks better on modern fibres – or polyester – than on cotton fibres,” says Knoops.

IFF has specifically invested in technology to create longer-lasting fragrances. It offers a patented controlled fragrance-release product called Encapsulation.

The amount of water used in a wash may also have an impact on fragrance performance – so understanding consumer preferences and trends is essential if IFF is to make sound strategic decisions.

Research consistently shows that – even with more functional products, such as powder detergent – fragrance is an important point of differentiation for consumers. However, it is very difficult for people to verbalise what it is they like about, or want from, a fragrance. When asked, Knoops explains, they tend to use the same words: “fresh, clean, long-lasting, and I like it”. Hardly a goldmine of insight.

To get a deeper understanding, IFF recently undertook a big ethnographic study in the US (see panel), but, of course, it also carries out smelling tests with focus groups. For the most part, this is done through a network of specialist local agencies with access to a “clean room” – a facility that does not interfere with fragrance smell – and that can handle the complex logistics of distributing product. ►



“Fragrance is an important point of differentiation for consumers. However, it is very difficult for people to verbalise what it is they like about, or want from, a fragrance. When asked, they tend to use the same words: ‘fresh, clean, long-lasting, and I like it’. Hardly a goldmine of insight”

ETHNOGRAPHIC INSIGHT

IFF collaborated with Ipsos Mori on a major ethnographic study exploring how consumers react to fragrances in real-life situations. The project covered fragrances spanning a diverse range of categories: fabric care; air fresheners; cleaning products; shampoo; body wash; and deodorants.

Ethnographic exploration took place in the US, among 30 families, with everything filmed. The team ended up with 180-200 hours of footage to analyse.

Participants also kept smartphone diaries about their routines and experiences. These were uploaded via a mobile portal, which meant consumers could record their feelings 'in the moment'.

"This was a real beast of a project," says Ipsos Mori head of ethnography Oliver Sweet. "It covered six different categories and involved an exploration of people's homes, their personal lives, interactions with other people, social norms and a wider understanding of what was important to consumers – as well as looking at shopping behaviours."

The observational work was followed by day-long workshops involving Ipsos Mori and teams at IFF's four main hubs – these were conducted face-to-face in the Netherlands and France, and via Skype with the US and Singapore. Workshops included playback of footage so that IFF in-house people could see for themselves what happened, and benefit from the ethnographic researchers' analysis and recommendations. At the end of each workshop, IFF staffers suggested potential new products on the back of the findings.

One of the biggest insights to come out of the project was that US consumers have a different attitude to freshness – "they never open their windows" – because of air conditioning.

"More than 50 opportunity areas were identified," says Sweet. "Potential gaps were then put forward to IFF and went through a funnel, internally, to try to work up three or four new products as a result." This is in keeping with IFF's stance that all insight should be actionable.

The research findings were presented to the top of the organisation – IFF's CEO received a half-hour briefing. Importantly, they are also being embedded throughout the company via e-learning modules.

"We are just finalising nine insight modules to go on IFF's human resources portal," says Sweet. "Everybody in the company has to log on and go through them as part of their CPD. They will watch our films, read our insight, and then answer some questions as a quiz."

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► Sometimes IFF works hand-in-hand with a client, undertaking research together and sharing the results as part of a cogeneration process. For other projects, however, it may work to a brief “in a silo”, if that is what the client prefers. As one would expect, Knoops says a collaborative approach usually delivers a bigger impact.

There are currently several significant trends that IFF – in common with many other organisations – is wrestling with. First, changing consumer tastes. Millennials, a generation known for seeking out new experiences, do not disappoint when it comes to fragrances; research finds that they are often attracted to strong, intense scents. Keeping abreast of these changing preferences will be vital for innovation.

Second, while fragrance matters a great deal to consumers – many will sniff a shampoo or fabric conditioner in the supermarket – the growth of online shopping means people often buy before they have the chance to smell a product. IFF’s strategic insight team is spending more time trying to figure out how to communicate a fragrance beyond smelling it. The use of colours figures large here.

Last, but most certainly not least, is the issue of sustainability. IFF is involved in a range of eco-friendly and socially progressive activities, including opening an onsite wind turbine at its Tilburg facility, in the Netherlands – unique to the flavours and fragrances industry – and joining the Well Living Lab Alliance. This initiative, led by Delos and Mayo Clinic, aims to develop healthier indoor spaces through human-centred research.

Cradle to grave

This commitment to sustainability has fed through to product development. In 2016, IFF launched PuraVita, a fragrance with notes of green apple, wood, apricot and vanilla. It was the first Cradle to Cradle-certified fragrance, meeting a product standard that guides designers and manufacturers through a process encompassing five categories: material health; material reutilisation; renewable energy and carbon management; water stewardship; and social fairness.

“Sustainability is an important driver for us in terms of scientific advancement,” says Knoops. “We have a strong focus on enhancing the wellbeing of the planet and its people. Developing a Cradle to Cradle fragrance is a big achievement considering all the criteria you have to meet.”

IFF, with roots going back 128 years, has been listed on the New York Stock Exchange for more than half a century. But it is not an organisation resting on its laurels (workers in IFF labs are probably busy extracting scent from this plant, along with many others!). The business is being driven forward by consumer insight and innovation with a healthy focus on sustainability. ■



CV STAN KNOOPS

Oct 2014 – present
Global head of insight, IFF

Apr 2011 – Sep 2014
Head of consumer insights Europe, Unilever

Apr 2008 – Apr 2011
Group leader, Global Consumer Insights, Unilever

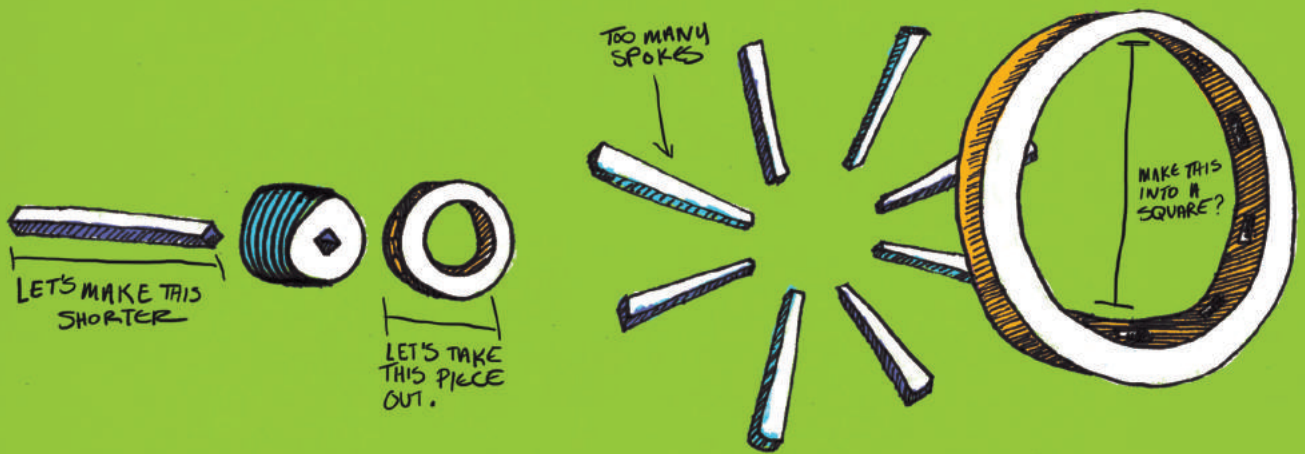
Apr 2002 – Mar 2008
Various roles at IFF, rising to director, marketing and consumer insight for Greater Asia

Apr 1998 – Mar 2002
Project manager sensory research, OP&P Product Research

1994 – 1996
MSc, consumer behaviour and economics, University of Groningen

1992 – 1993
Master’s degree, sensory research, Cornell University

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CONSOLIDATION IS COMING

MERGERS AND ACQUISITIONS WITHIN THE RESEARCH SECTOR ARE NECESSARY AND INEVITABLE, ARGUES FUTURE THINKING'S **JON PRIEST**

The next wave of consolidation in the UK insight and business intelligence market is long overdue. We have a more fragmented supplier base than ever before – with over 500 MRS-accredited company providers – but with low net-growth rates overall, serving a very mature £4.8 billion UK market. While this is the second-largest globally, it is still relatively small compared to the UK e-digital sector (£118.4bn), PR market (£12.9bn), creative industries (£87.4bn) and management consultancies (£6.1bn).

Our industry is also undergoing rapid change – mostly technology-driven – against a very uncertain worldwide geopolitical context. Consolidation will help us meet the global growth challenge.

The UK 'research' market is unusual in the size and distribution of its supplier base. According to MRS, the top 100 agencies generated approximately £3bn of UK revenues in 2015. As in most industry sectors, there are a handful of large companies at one end – Wood MacKenzie, dunnhumby, TNS UK, Ipsos Mori and Gartner, which account for 34% of total spend – and small/specialist businesses at the opposite end.

What is notable about our sector is the large number – and significant market share – of the £7m-£20m players, who have more than half the market between them. Consolidation needs to focus on the bigger area of small and medium-sized enterprises (SMEs), as over-supply among these providers is impeding industry growth.

Consolidation is good for our industry and need not restrict the existence of the smaller specialist. Companies that acquire or merge achieve greater scale, and enhance their own third-party supply-chain buying power.

This helps them price to clients/procurement more competitively, while offering a broader bandwidth of service offerings, often across an expanded international footprint. Economies of scale and restructuring help boost earnings, and this raised profitability allows for greater reinvestment, mainly in recruitment, skills training, and research and development. If done correctly, such a coming together also leverages management talent and makes the enhanced concern more secure – so, greater efficiency all round.

The above describes a 'horizontal' merger – as it is often referred to – and is typical of how most mergers and acquisitions (M&A) in our sector are concluded. More should really be happening now, at a time when mutually agreeable acquisitions can be consummated before the inevitable shakeout from oversupply happens.

Further, it does seem that people/labour-centric businesses – the old 'full service' agencies – and the newer, MR technology and data-supply companies are increasingly misaligned.

Perhaps most significantly of all, consolidation increases access to capital markets – and at a lower cost of entry. Be it debt or equity finance, the truth is that most UK capital providers are only comfortable lending to research companies generating £4m-£5m-plus earnings before interest, tax, depreciation and amortisation (EBITDA), either before – or as a result of – an acquisition.

This enhanced capital access is vital – we need investment to meet the global growth challenge, rather than 'bootstrapping'. Our industry's relationship with investment companies is lukewarm at best, given how mature our sector is, with corresponding low

ANN. DATE	TARGET COMPANY	BIDDER COMPANY	DEAL VALUE GBP (M)
Apr-17	AMA Research	Barbour ABI	n/a
Feb-17	General Advertising & Marketing Measurement & Analysis Associates	mTAB	n/a
Dec-16	Imagini Europe	Nielsen Holdings	n/a
May-16	Market Metrics Inc; Matrix-Data	Strategic Insight	121
Feb-16	eDigitalResearch	Maru Group	n/a
Jan-15	Research Now	Court Square Capital Partners	n/a
Sep-14	The Planning Shop International	Adelphi Group	n/a
Jul-14	Harris Interactive AG; Harris Interactive SAS; Harris Interactive UK	Toluna Group	n/a
Aug-12	Data2Decisions	Dentsu Aegis Network	n/a
May-12	Harvey Walsh (51% Stake)	Open Health Communications	4
Mar-12	IMS Research	IHS Markit	29
Sep-11	Retail Eyes (UK)	Market Force Information	8
Jul-11	Synovate	Ipsos SA	525
Apr-11	Munro Global	Future Thinking	n/a

Source: UK market research transactions, mergemarket

growth, highly people-dependent businesses, challenges around scalability of propositions, price pressure and the rise of automated/plug-and-play solutions.

Consolidation – be it a standard buy-and-build platform, a stand-alone acquisition, or a merger creating a ‘branded house’ (GfK, Ipsos Mori) or ‘house of brands’ (Kantar) – helps us build mass and operational efficiency, and stimulates growth.

Mergers also have a role to play in turbulent times. It would not be a surprise to most if Omincom DAS was to merge its two MR brands – Hall & Partners and Flamingo – for example, creating a very compelling proposition for clients.

All the above are important benefits of consolidation when done the right way – with truly complementary businesses that have differing international footprints, synergy benefits and a compatible culture. Personally, having overseen my fair share of M&A deals since 2010, the role of a specialist integration consultancy – such as KPMG Boxwood – helps ensure an effective operational and cultural integration that starts before the sale and purchase agreement is finally drafted.

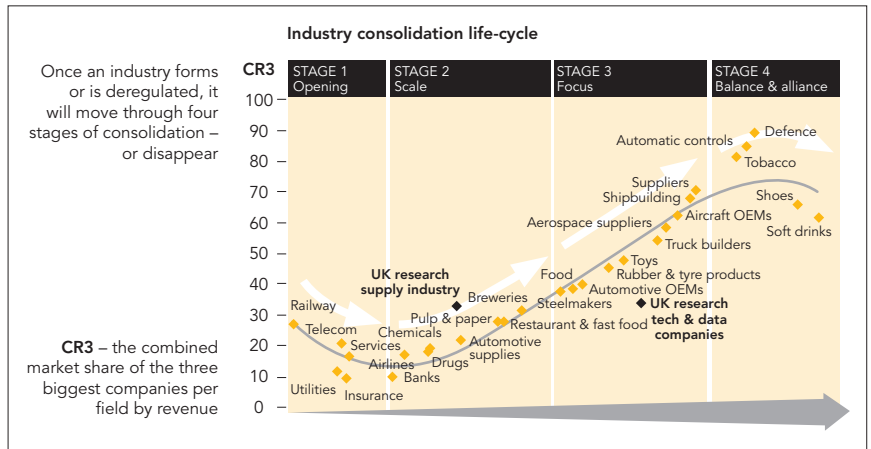
On the face of it, our industry looks OK, with the UK market growing from £3bn in 2012 to £4.8bn in 2016, according to PwC’s *Business of Evidence* report – a compound annual growth rate (CAGR) of 12.5%. Yet this disguises true like-for-like growth, driven as it mainly is by the recent inclusion of market intelligence companies, information service providers and technology enablers. Strip out the likes of dunnhumby, Teradata UK, Euromonitor, Mintel Group and Experian, and we have, I suspect, negative real growth – and all the baggage this comes with, such as price deflation, margin pressure and lack of investment – among the traditional full-service agencies. Associated or secondary businesses are also affected; the MR job-recruitment market, support services and external field operations are all finding it hard going.

SMALL IS STILL BEAUTIFUL

Niche or specialist offerings in data or qualitative research will always characterise our industry, and rightly so. Fifth-wave start-ups are more popular than ever; frequently personality-led and run as private, or even ‘lifestyle’ businesses, they benefit from an industry that has hardly any regulation and very low barriers to entry, often serving a small number of very loyal clients. They are part of what makes our sector so interesting – but, with respect, they will not create the mass required to get our industry growing globally.

Consolidation helps diversify the industry by ‘bundling’ an array of products and services to cross-sell to clients. Another reason to do it, I would say – other than the benefits and capital-market-for-growth arguments – is that our industry has never consolidated properly, certainly not on a large scale. There have only been 14 acquisitions since 2011. We seem to have missed this chapter completely. During the most recent non-consolidation period, however, there has been a high rate of new agency creations. Market consolidation is required to re-set the balance (see table).

In 2002, *Harvard Business Review* published The Consolidation Curve, a study of 1,345 American mergers across 30 industry types, from 1989 to 2001, which identified the now widely acknowledged four stages of consolidation and their characteristics (see graphic). The research industry is only just entering Stage 2: Scale, in which: “Major players begin to emerge, buying up competitors. The top three players in a Stage 2 industry will own 15% to 45% of their market, as the industry consolidates rapidly. Because of the large



number of acquisitions in this stage, companies must hone their merger-integration skills. These include learning how to carefully protect their core culture as they absorb new companies. Building a scalable IT platform is also crucial to the rapid integration of acquired firms.”

There are also elements of activity at Stage 3: Focus among technology and data analytics, with the larger players in this sector either emulating or acquiring start-ups. The difference with consolidation of this type is that it is a more tech-driven dynamic, rather than a consequence of a maturing market or over-supply. Large-scale panel provider mergers would also fall into this type of consolidation, with the top three companies controlling anything between 35% and 70% of the available market.

The Harvard article concludes: “Ultimately, a company’s long-term success depends on how it progresses through the stages of industry consolidation. Speed is everything.”

Indeed it is – and not just for a company’s long-term prosperity, but also for the industry’s success overall.

To this end, we must actively consolidate as an industry and begin a new chapter in the growth of market research and business intelligence in the UK, to meet the global growth challenge. ■

Jon Priest is chief executive officer of Future Thinking

Derek
McInnes



THE CALM BEFORE THE STORM

DESPITE BRANCHES CLOSING, CUSTOMER TRANSACTIONS WITH THEIR BANKS ARE INCREASING, LED BY MOBILE APPS. WITH OPEN BANKING ON THE HORIZON, BANKS NEED TO ACT FAST TO FACE THE 'FINTECH' DISRUPTION COMING THEIR WAY. BY **DEREK MCINNES**.

There is a storm on the horizon. Retail banks are on the brink of unprecedented change, fuelled by customers' shifting expectations and developing technologies, but pushed to a tipping point by a radically reshaped regulatory environment.

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For incumbent banks to remain relevant and prosperous, they must build a mobile offer with services that meet – or exceed – the outcomes these high-value, high-risk customers desire. A one-size fits-all approach won't work any more.

Yet, on the surface, all looks calm. Recent figures from the BBA, the trade association for the banking sector, show that – even at a time of steeply declining branch visits – the overall number of interactions people have with their bank is rising – up from 2.3 to 3.5 per month since 2011. We're using our banks more and more in the UK.

Looking at high-street banks' annual reports shows that digital – mobile rather than web – is now our primary banking interface. Our own research has found that almost 25% of connected customers use their main bank's mobile app daily, with around half using it at least once a week. Furthermore, of all the app categories on a smartphone, banking ones score highest when it comes to having made the biggest impact on how people do things.

But this does not mean banks' customers actually care; our research shows almost three-quarters are neutral – or only slightly agree – when asked if they value the service from their bank, or if it is better now than in the past.

Not great, but not really that surprising. Our expectations of service, and our digital experience, have been set across categories such as media, transport and retail; they haven't been made in a solely banking context.

When it comes to giving customers a view of their finances, the banks' proposition hasn't changed fundamentally for 50 years. Today's mobile offering is one size fits all – effectively, a shrunken web version of the original paper statement. Not very personalised at all.

What came through strongly in the research was an overwhelming sense of indifference to banks' digital offerings. Customer use is driven by necessity and the lack of an alternative. Our growing number of interactions are transactional and are not delivering a meaningful impact on the outcomes we seek.

This is a remarkably familiar story – the same tale of every industry before disruption hits.

Banking challengers are already emerging. The new tranche of licences for companies such as Monzo are evidence that alternatives – focused on a frictionless customer experience – are coming through.

While banks maintain their traditional hold on supply of our data, the risk of customers' switching is relatively low – but, with open banking, that hold is weakening. The regulatory upheaval will mean more challengers will follow.

Open banking is the trigger for disruption, and refers to two pieces of financial regulation – the Competition and Market Authority's Open Banking Remedy in the UK, and the European Union's Payment Services Directive 2 (PSD2), aimed at creating more competition in financial services and improving the quality of services on offer to customers.

It means it will be possible for people to allow third parties beyond their bank to read their customer, balance and transaction data. Eventually, if they have permission, these third parties will be able to write data and make payments directly from a customer's account.

Once these standards are in place, a range of operators will be able to offer services that require this access. In our research, we tested 11 simple headline ideas, such as: keeping track of where you spend your money across all your accounts and cards; proactively investing an agreed amount based on your saving goals and ambitions; and accessing and managing all your accounts, cards, insurance, loans, and investment portfolio.

We found an openness to – and interest in – these new banking ideas across customers, but significantly more so with two specific groups: those who are affluent, with more complex finances, and younger, urban-living people. So customers with significant current and future value – who share the general indifference to their banking relationship – are the ones most 'at risk' to services supported by open banking.

Strikingly, though, the new banking ideas that customers are most interested in isn't predictable within these groups; it is much more nuanced than that. People respond to banking ideas, features and services that support their life, their needs and the outcomes they seek.

Fundamentally, customers are most influenced by their mindset around money and the way they like to do things. Whether that's wanting everything made easy and done in the background – or being utterly engaged and wanting to see every option weighed up – a customer's mindset is critical to what they seek from their bank. But mindsets cut across age, geography and affluence.

Critically, our research showed that the majority of customers are much more interested in these new features and services being offered by their own bank, rather than moving to an alternative provider.

We believe there is a short window of opportunity, and see four ways in which retail banks can refocus and successfully meet the challenges that open banking will bring:

- 1 Think customer mindsets, not segments. Mobile product excellence relies on a higher-definition picture of customers and prospects. Banks must refresh their view of what people are trying to achieve, where they are (literally and figuratively), and how they like to do things – and then embed this knowledge throughout the organisation.**
- 2 Identify defensible positions within the emergent digital environment. Banks should use heightened customer understanding to assess how well products and services perform compared with alternatives in the market. Then, amplify strengths and reshape propositions to better meet customer needs.**
- 3 Develop mobile-first thinking, infrastructure, capabilities and organisation. New capabilities need to be developed or acquired – not just within the teams delivering products, but within those creating them, as well as those closest to customers in branches and contact centres.**
- 4 Get started – experiment, test and learn alongside your customers. Creating focused, targeted prototypes that can validate, iterate and improve propositions is the path towards really understanding what customers value.**

The coming storm has risk and opportunity for UK retail banks, but fast action is needed before alternatives become reliable and mainstream. By building a mobile offer with services that deliver across the spectrum of outcomes that the high-value, high-risk customers desire, banks can build their relevance and grow business. ■

Derek McInnes is director at Incite

IN SEARCH OF HAPPINESS

SUCCESSFUL BUSINESS STRATEGY NEEDS TO INCLUDE A MEASURE OF HAPPINESS AND A RECOGNITION THAT BRAND PURPOSE MUST INVOLVE MORE THAN JUST MAKING MONEY, WRITES **ANDY DEXTER**

There have been seismic swings in Western society and social attitudes lately, against a decade-long backdrop of global economic crises. People are feeling anxious and unhappy, and big business is not immune from the effects.

At the same time, we see a shifting articulation of public priorities and values towards: society, not just self; wellbeing, not just money; experiences, not just things. The theme is a longing for simplicity and authenticity.

We see cynicism around much CSR, coupled with an implicit desire for a better form of purpose. People have begun to ask: What are you for? Why do I need you? Who really benefits? Why is our world better for your presence?

Firms might get away with business as usual for a while but, long term, they can't be seen as just money-making machines. Brands need to help people and society grow, and they need to prove it – for the sake of their reputation and their future.

That's why the Culturise Collaboration aims to quantify wider dimensions of what makes a good business – in terms not just of money, but also purpose, meaning, behaviour, and its measurable contribution to the sum total of human happiness.

Ultimately, you could say that brands only have two reasons for existing – to make money and, one way or another, make people happy. The first is dependent on the second and, however it is defined, happiness is the goal of every human being.

HOW DO YOU MEASURE HAPPINESS?

The 2017 Worldwide Happiness Report (WHR) measures people's happiness between countries, explaining variations according to issues such as: GDP; healthy life expectancy; social support and infrastructure; and freedom to make life choices.

The average country figures can be explained reasonably well via the WHR model, taking into account factors such as a nation's relative wealth and social freedoms (the UK is ranked number 19 for happiness; Norway is top).

But what explains the individual variations within a country, aside from inequalities in social and personal conditions? Research on individuals' happiness and wellbeing in the relatively privileged West has typically been derived from two perspectives. First, the hedonic approach, which focuses on happiness as we might normally understand it, and largely defines wellbeing in terms of near-term pleasure attainment and pain avoidance. Second, the eudaimonic approach, which focuses on deeper meaning and self-realisation – a sense of inner purpose and fulfilment.

I believe the latter is ultimately far more important, but it also needs to be coupled with related measures such as locus of control, subjective quality of life across all its dimensions, and cultural affinity – with a dash of positive psychology thrown in. Only then do we begin to perceive the outline of a more complete and coherent model.

To build this and make it relevant for brands, we're combining principles from many disciplines: evolutionary economics; normative ethics; psychology; and cultural theory. Evolutionary economics, for example, challenges economic orthodoxy – rebutting the received wisdom of the primacy of shareholder value and instead focusing on the organisational ecosystem. The theory is that a healthy corporate organism thrives through balance, and that financial success alone – if achieved at too high a short-term cost in a wider cultural sense – will prove ephemeral.

The discipline of normative ethics – especially Utilitarianism – plays directly into

this. With normative ethics, the best action or behaviour ought to be the one that maximises utility (good effects) on the wider canvas. This is referred to as the sum total of human happiness.

In this context, the notion of human happiness as a measurable utility acquires a more specific meaning. It's not just a smiley-happy-warm feeling or about the quality of life experience, it's also about deeper human wellbeing – physical and emotional – coupled with lasting social and cultural goodness.

To evaluate that sum total figure, we need to look beyond consumer research. How does a firm's products, services and broader behaviours affect: staff; customers; the supply chain; wider society; the world at large? If your customers are happy but your staff are miserable, how do we balance this? If your staff are happy but you're exploiting the developing market supply chain and asset-stripping the planet, what is the equivalent measure?

While few brands will change people's worlds, those that seek a meaningful level on the dimensions of happiness will grow stronger roots. For example, a brand anchored in cultural affinity or personal fulfilment, will be stronger than one that offers fleeting pleasure.

But brands also need to be authentic and be careful not to overreach. There are many examples of a cultural and emotional tin ear in this particular quest – think the Pepsi 'protest' ad or McDonalds' 'dead dad'. We all know what they're trying to do, but people know fake authenticity when they see it. And that doesn't make people happy. ■

Andy Dexter is founder of the Culturise Collaboration and principal of Neon & Vine

Stranger than fiction

It is a well-known axiom that stock markets hate uncertainty. Yet despite four years of political uncertainty in the UK, the FTSE 100 Index hit a new high of 7547 on May 26, 2017. That's because a less well-known fact is that markets climb so-called 'walls of worry'. It is why Warren Buffett claims to be greedy when others are fearful and fearful when others are greedy. It's reverse human psychology.

Moving from markets to media, the newest trend in ad land is that of management consultants snapping up advertising agencies – such as Accenture buying Karmarama – in order to set themselves apart from competitors and to get closer to the end user through experiential marketing. It's the reversal of an old trend last seen in the 80s when Saatchi & Saatchi – then the world's largest advertising network – was busy acquiring Gartner and Petersen, established international consultants to create a one-stop shop. Plus ça change.

Another similarly interesting reversal is media owner Vivendi acquiring the 40% of advertising and marketing services group Havas that it did not already own. In 1989, Havas itself was buying outdoor media owner MAI (formerly known as Mills & Allen International), now part of the global JC Decaux OOH (out of home) empire. Back to the (French) future.

When my mother was a young woman in the 1940s, most newlywed couples had a family home, but few people had a family car. Now it's the reverse, everybody has a car – thanks to PCP (personal contract plan), which some say is the next US sub-prime crisis waiting to happen – but few own homes. The average age of a first time homeowner in the UK is now 37, yet interest rates are the lowest in history. So what's the



“Trump was welcomed with the fanfare of a close and trusted ally”

problem? It's near-impossible to amass a deposit, of course, so there's no point in pricing something cheaply, if it's not actually available.

Talking of cars, Uber, the tech disruptor whose business model is based on the so-called 'gig' economy, has launched a driverless car service. This inevitably means heavy capital expenditure, and yet the firm is loss-making even based on short-term contractors using their own cars in return for flexible working hours and no health or holiday benefits. An about turn? Or maybe a U-turn?

On the subject of business models, here's one that defies common sense and logic. Snap Inc, owner of Snapchat, floated on the New York Stock Exchange in March 2017 with a prospectus that highlighted that it may never make a profit, and that all voting rights rested with its founders, even if they chose to leave the company. Yet, it opened at a huge 44%

premium to the offer price, which valued it at \$33bn. This endorsed the old adage that: on the West Coast, it's all about vision; the East Coast, turnover; and in London, profit. Snap, crackle and pop...

Back to reflecting on Uber, which is still in the news for its treatment of its female employees. Interesting to note that the Saudi Arabian Public Investment Fund made a \$3.5bn investment in Uber in December 2015 – the single largest investment ever made in a private company; and yet women are not allowed to drive in Saudi Arabia.

Which brings us elegantly to US President Donald Trump and his first foreign trip as the leader of the free world. And where did he choose to go? Why, to the Kingdom of Saudi Arabia – a dictatorship that holds back the rights of women, and from where 15 of the 19 9/11 hijackers who blew up the World Trade Center are said to have come. A heroic exercise in hypocrisy, since he spent most of his election campaign denouncing the Kingdom and then, immediately on becoming president, banning Muslims from entering the US.

Yet the hypocrisy was equally shared with his royal hosts. Saudi sees itself as the birthplace of Islam and home to the two most holy mosques of Mecca and Medina – and yet Trump was welcomed with all the fanfare of a close and trusted ally. No surprise then, during Trump's visit, that Saudi's Public Investment Fund announced its intention to invest \$20bn in a new \$40bn Blackstone US infrastructure fund – and that's before Saudi's Aramco almost certainly makes its initial public offering on the New York Stock Exchange. Business is business. Trump is Trump. ■

Lorna Tilbian is executive plc director and head of media at Numis Securities

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We are a full service consumer and B2B research agency and for 25 years we've been developing the best research practitioners in their fields.

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View from Silicon Valley

Talk to different insight teams in Silicon Valley and you'll find that researchers are increasingly faced with a million 'whats' and very few 'whys'. It's great to have data describing what's happening within your product but – without context or explanation – then you're dealing with Blind Data and not Big Data; it's the 'whys' that are golden.

Sifting through the 'whats' to find the 'why' is a problem that's sharply felt in Silicon Valley, but it's also a problem that will continue to be felt by more insight teams as brands invest in expanding the data they collect and use every day to help make decisions.

Clearly this is not a new trend but it's one that continues to pressure the relationship between agencies, research teams and stakeholders who are increasingly self-sufficient when it comes to information. Here, I've seen in-house researchers and agencies alike respond rapidly, and become focused on being their stakeholders' connections to context, offering an external perspective on their business and *only* tackling the 'why' questions.

This is a big change from the past role of researchers as measurers-in-chief, analysing product adoption, customer trends and supplying numbers and dashboards to their CMOs. In Silicon Valley – and increasingly beyond – that's becoming the domain of behavioural data and data science teams. Instead, researchers here are embracing their roles as heads of why.

As a result of this shift, the function of agencies here has had to change in a way that – I think – reflects the future of client-agency relationships in industries awash with data. The most productive



“Researchers here are embracing their roles as heads of why”

relationships I've seen in the US between data-rich companies and their agencies revolve around three pillars:

1. Question-storming

The physicist Richard Feynman once said: “I'd rather have questions that can't be answered than answers that can't be questioned”. We think about that a lot in our team. Finding the perfect question to ask of our data is critical to finding the 'why'. Rather than brainstorm answers, we instead have to know what questions we need – a process my VP calls question-storming. Agencies that spend time helping us find those questions are the ones we ask to assist us to answer them.

2. Extend clients' analytical capabilities

Despite the amount of data in tech companies, thankfully not every researcher is going to be a

statistician. Indeed, it's the diversity of our backgrounds that make research teams so interesting to be a part of. However, it's increasingly important that clientside researchers can talk to – and defend their work – to an audience of engineers and data scientists who are themselves postgraduate mathematicians.

Agencies that can offer specialised analytical support to their clients by keeping up to date with the latest trends in data analysis are highly valued and are always going to be preferred to those wedded to older techniques.

3. Diversify methodologies to complement what clients already have

I think I've done more qualitative research since moving to San Francisco nine months ago than in the previous four years of my career. I've seen traditionally quant-heavy agencies over here all but abandon survey-based research when dealing with tech companies and concentrate instead on highly-focused, deep qualitative research instead.

Qualitative research is often revered here as it is uniquely powerful at finding the 'whys'. Agencies that fully understand what is already being measured internally can then diversify and focus on being the qualitative yin to their client's quantitative yang.

So there we have it. The three pillars of client-research agency relationships in Silicon Valley, and a possible model for the future – question storm, extend, diversify. QED. ■

Matt Taylor is consumer insight lead at Twitter

BRAIN TRAINING

AUTOMATED IMAGE PROCESSING COULD BE GETTING SMARTER, WITH SCIENTISTS TEACHING MACHINES TO THINK MORE LIKE HUMANS. BY **BRONWEN MORGAN**

Communication is, in many ways, shifting from words to images. The ease of creating – and deleting – images via smartphones and other portable digital devices means that more than one trillion photos are now shared across Facebook, WhatsApp, Instagram and Snapchat every year.

The content of these images is of great interest to brands, because it can offer insight into the lives and aspirations of current and potential customers.

As this trend – and the amount of imagery – grows, there is more and more demand for automation of image processing. While machines are becoming more sophisticated, they are still a long way behind humans when it comes to tasks such as object recognition.

Not only is the pattern of errors made by current algorithms apparently quite different from those of humans performing the same task, but the algorithms are also reportedly easy to fool. Research has shown that, by changing an image – in a way imperceptible to human eyes – that has originally been classified correctly, a deep neural network can be tricked into labelling it as something else entirely.

Similarly, these networks can easily be tricked into thinking that images of TV static are objects – in some cases with more than 99% confidence.

In an attempt to make machine thinking more closely resemble that of a human brain, a team of academics at Harvard University – led by David Cox – has been looking into improving the process by using activity from human brains as a kind of training tool.

Cox's team is investigating a 'neurally weighted' machine-learning approach, which involves feeding data from functional magnetic resonance imaging (fMRI) measurements of human brain activity into the process of an object-recognition learning algorithm.

According to the research paper, "the human brain is a natural frame of reference for machine learning, because it has evolved to operate with extraordinary efficiency and accuracy in

complicated and ambiguous environments." However, despite the brain having "long served as a source of inspiration for machine learning", the paper claims "little effort has been made to directly use data collected from working brains as a guide for machine-learning algorithms".

The study used data from fMRI scans taken while a subject viewed nearly 1,400 images, which included four different types of object: humans, animals, buildings and food. The team analysed how regions of the brain's visual cortex responded to these images; the different objects had corresponding patterns of brain activity, with the strength of the signals indicating how difficult each image was to classify.

This information was then used to train machine-learning algorithms: if an algorithm made a mistake on an image that should have been easy to classify, it was penalised more heavily than if it made a mistake when classifying a 'difficult' image.

This meant the system was being told what information it should base its classifications on, to minimise errors. As a result, it performed better on images that were easily recognised by the brain and, in doing so, was learning to make decisions in a more human way.

The results revealed that training a basic image classifier with the fMRI data improved its accuracy by between 10% and 30% across the different categories.

Nick Gadsby – founder and principal of semiotics and cultural insight agency The Answer, which recently launched a method for analysing consumer visual language – believes that this approach could be a starting point for the relatively accurate tagging of large numbers of images.

"The system's unique claim – that it infuses fMRI data from the brain of a human subject viewing images into the training process of a machine-learning algorithm – is testament to the distinctive way in which humans perceive and process visual information – and sensory information more generally – and, of course, make it meaningful in the process," says Gadsby.

"Although the data from the study shows that even the most successful combination of algorithms and loss functions fell short of human accuracy, it does promise the development of an approach capable of near, if not absolute, accuracy."

But Gadsby points out that, even at this advanced stage, a program capable of identifying the content of images at a commercial level would still need to take into account a much wider body of fMRI data. This includes differences in cultural perceptions, as studies comparing Western and East Asian processing have demonstrated.

The other consideration around machine learning based on models of the human brain, Gadsby says, is that it almost always treats human learning as a process based on individual trial-and-error experience. But in related fields, such as cognitive psychology and neuroscience, he adds, the emerging consensus is that humans are evolutionarily predisposed to social learning – so our perceptions are not necessarily based primarily on what is objectively out there, but rather by the way objects are collectively classified.

"While simple object recognition may present itself as a probable activity for individual classification, for the general field of machine learning to advance, much consideration needs to be devoted to modelling social learning," Gadsby says.

The study also highlights the fact that – as the volume of visual research data increases – the research industry will need to become better informed about neuroscientific understanding of vision. This includes debates about the relationship between feed-forward, feed-backward and re-entrant models of visual processing, the dynamics of lower- and higher-level processing, and broader shifts in theories of perception toward predictive models. ■

Using human brain activity to guide machine learning, by Ruth Fong, Walter Scheirer, David Cox on the Computing Research Repository (CoRR) arXiv:1703.05463

HUMAN INTERVENTION

USING MACHINE LEARNING TO MAKE DECISIONS AROUND PUBLIC SERVICES CAN SAVE TIME AND MONEY, BUT CAN ALSO EXACERBATE EXISTING DISCRIMINATION. BRONWEN MORGAN LOOKS AT POTENTIAL SOLUTIONS

Machine-learning algorithms are everywhere. They are used by taxi apps such as Uber to calculate when to impose surge pricing during peak times, and by Facebook to decide what content – and ads – to display.

They are also beginning to be used by some financial services companies, to inform decisions on loan lending, and by police forces to engage in predictive policing. Past crime data is used in predictive-policing algorithms to highlight people and areas that are most at risk of future crimes, to help police chiefs decide where best to allocate resources. However, recent studies have highlighted that this approach may reinforce bad policing habits.

A review by the Human Rights Data Analysis Group – a not-for-profit organisation that uses science to analyse potential violations of human rights around the world – showed that, as these algorithms are based on databases of crimes known to police, they cannot predict patterns of crime that are different from existing patterns.

This approach is flawed for a number of reasons. First, the predicted patterns are likely to be substantially different from the true patterns because only half of crimes are known to police. Second, it may exacerbate the over-policing of certain communities.

COUNTERFACTUAL FAIRNESS

To combat this, academics – led by Matt Kusner and Chris Russell, at the Alan Turing Institute in London – are developing a framework to identify and eliminate algorithmic bias. They propose a definition called ‘counterfactual fairness’, which is based around the theory that a decision is fair towards an individual if it gives the same predictions in the observed world and in a world where the individual had always belonged to a different demographic group (where other background causes of the outcome are equal).

Kusner, Russell and their colleagues map out variables in a data set and test how they might skew decision-making processes. If they find evidence of bias, they find a way to remove or compensate for them, rather than ignore these attributes.

For example, the team looked at data from the New York City Police Department on ‘stop and frisk’ events, in an attempt to model variables that

would influence an officer’s decision to stop someone. First, they looked at all variables, including skin colour and appearance; then they considered only data related to criminality, such as whether they were carrying a weapon or had been arrested.

It was found that, in general, police considered black and Hispanic men as more criminal than white men, and stopped them more often. But evidence of criminality was found to be similar across the different groups.

“We propose that fairness should be regulated by explicitly modelling the causal structure of the world,” the report concludes.

Marie-Claude Gervais, research director at Dub, is a social psychologist by training, and has led consultation, research and evaluation programmes in a number of policy areas, including policing and community cohesion, equality and diversity. She says she is “delighted” that people are starting to understand the importance of putting algorithms and structural equation modelling in context.

“Numbers by themselves – although they look like magic little things that can solve every problem – are actually full of consequences, and they have



social, ethical, political and financial implications for people,” she says. “As a mindset, I think that’s very powerful.”

But Gervais doesn’t believe this advance takes us that much closer to a solution. “They’re absolutely right in identifying the core problem, which is that – to work out algorithms that might be suitable – you have to understand two things. One is the nature of the service that you are delivering, and how discrimination has played out historically – and could play out now – in relation to that service and in different groups.”

Ethnicity and race are two categories of interest, Gervais says. Sexual orientation and gender identity – as well as age and disability – are others.

The other point, which Gervais says is well known and has been picked up by the study, is that there is a difference between individual discrimination and group-level discrimination.

“You could have somebody who is prejudiced – whether they’re conscious of their prejudices or not – or an organisation that has structurally discriminatory procedures in place, although the individuals within it could all be perfectly lovely.”

These two issues, says Gervais, mean the technical solutions for each service

or target audience must be worked out on the back of serious consultation with experts around likely discrimination. What’s more, it’s vital to consider not just the data, but the interpretation of that data, as there is room for subconscious discrimination or prejudice there, too.

EQUALITY IMPACT ASSESSMENT

While the value of these approaches is high, the risk is too, Gervais says. “Because public services, by definition, affect everybody, there’s a real risk that the impact would be huge if they get it wrong.”

In some situations, the number of factors that must be considered to make a fair, thought-through decision means a more traditional decision-making approach could be more suitable.

Gervais describes a consultation project that she conducted with the Greater London Authority, which was an equality impact assessment on the London housing strategy for 10 years.

“The project involved consulting with all categories – that included looking into ethnicity, gender, disability, asylum seekers, people with refugee status, gypsies and travellers. They all had completely different issues in relation to housing – so if you wanted to create an algorithm for housing allocation, it would be incredibly difficult.

“There used to be a kind of algorithm, but the local authority moved away from that system and now it uses an approach called choice-based lettings; it puts all available properties in the area on its website, and leaves individuals to pick the one that suits their needs best.

“It realised that trying to work it out on people’s behalf was creating all sorts of distortions, and spatial and employment segregation. So the authority shifted away from trying to process it itself to giving choice to residents – and it worked.

“Leaving it in the capable hands of the people who live with the consequences of their decision is a good idea.” ■

Counterfactual Fairness, by Matt Kusner, Joshua Loftus, Chris Russell, Ricardo Silva (Preprint) arxiv.org/abs/1703.06856

IT'S THE WAY YOU ASK IT

COGNITIVE BIASES CAN BE TRIGGERED BY QUESTIONNAIRE STRUCTURE – BY MISTAKE OR BY DESIGN, AS **CRAWFORD HOLLINGWORTH** EXPLORES

A frequent objective for all is measuring customer satisfaction. Without this information, it's hard to know how, where and what to improve in a product or service. Yet it's not always easy to gather customer feedback accurately.

However, behavioural science can offer explanations for why a survey is often not as accurate or informative as we might hope. Selection bias, dishonesty and subconscious cognitive biases – such as framing and priming effects and reference points that skew responses – can all influence responses.

Behavioural science can also offer some useful guidelines for better measurement of customer satisfaction. In this article, we'll look at four insights into the design of research and survey questions to make them more effective.

Questions that collect objective, behavioural information can increase accuracy

Survey questions are often open-ended and unstructured in their language to avoid priming a particular response from a customer. However, they leave respondents with considerable 'wiggle room' in how they answer, and can lead to skewed responses.

Why? Because research into dishonesty has found that the majority of us cheat and lie a little bit. Asking general, broad questions often gives us leeway to be creative in our answers, or rationalise to ourselves why it's OK to give the answer we do.

Asking semi-structured questions about specific issues can make it harder for people to omit or gloss over problems or poor performance and has the potential to give more objective or specific information about outcomes or behaviours.

Similarly, if people need to select from a range of answers, it can help to make those more specific to reduce wiggle room. Dan Ariely, professor of behavioural economics at Duke University, North Carolina, US, says: "Take the question, 'How often have you done X?' If you create a scale from 'very rarely' to 'very frequently', that's not as useful as offering, '2 times last week' or '3 times last week'. It is important to use categories that people can accurately quantify. The more concrete your response scale is, the more likely people are to answer your questions in an informative way – and answer accurately and honestly."

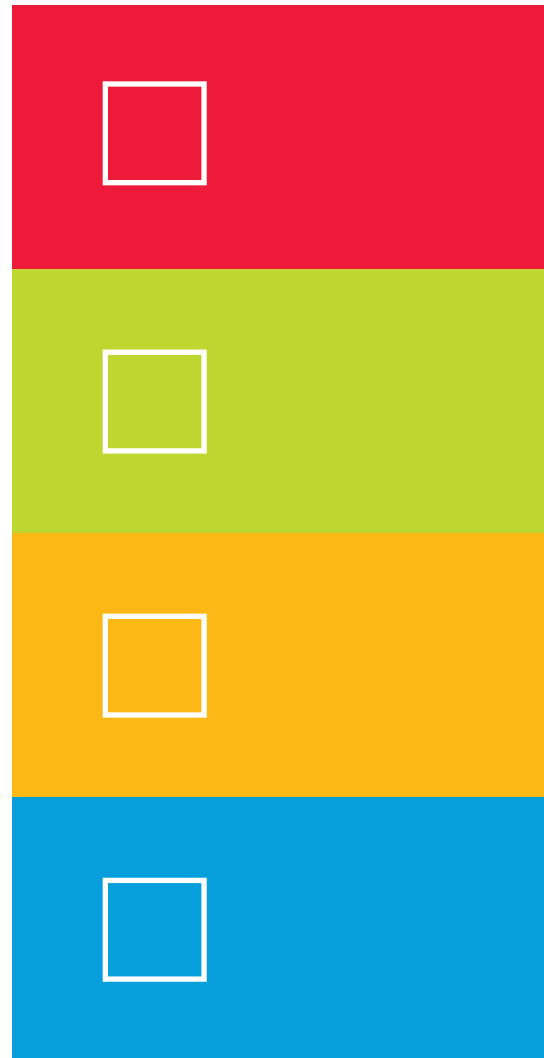
How we frame a question can influence our response

We can ask a question in many different ways: in the language we use; how we structure the question; and, in particular, by what we make salient; but, this may elicit different responses. Behavioural science has shown our decision-making can be influenced by how information is framed or presented to us. A simple example is how we judge the quality of meat labelled '90% lean' versus '10% fat'. Most of us will be drawn to the '90% lean' frame, conscious of healthy eating advice.

This insight can extend to how questions are framed, too. What element does the question most bring to mind? To what extent does the way a question is worded suggest a status quo or a situation that implies most others are happy with it?

In the run up to the 2008 US presidential election, pitting Barack Obama against John McCain, the firm behind the NBC News/*Wall Street Journal* poll included questions that demonstrate how powerfully framing effects can affect our perception and choices.

When people were asked who 'would be the riskier choice for president – John McCain or Barack Obama', the results were 35% for McCain and 55% for Obama. Yet when asked who 'would be the safer choice for president', the results were 46% for



McCain and 41% for Obama. More people than before now perceived Obama as a safer choice. The percentages should be mirror opposites, but a clear framing effect skews them.

Other issues of question framing also arose in the referendums for Scottish independence and the UK's alternative vote.

Spending time reflecting on how best to frame the question to which you need an answer is essential for gathering unbiased responses.

Continuous rating scales can be more sensitive than discrete scales

Customer feedback and ranks need categorising, so we often ask customers

BLUE

RED

YELLOW

GREEN

to rate a service using a discrete scale – known as a Likert scale – ranging, perhaps, from very poor; poor, satisfactory; good, to excellent.

Behavioural science suggests that discrete rating scales like this can influence the accuracy of people's responses and lead them to avoid the extremes of the scale, so that most responses cluster in the middle area. Again, Ariely explains: "Often people use a five-point response scale, but we find most people have an aversion to the extremes. This means that when we use a five-point scale, we are effectively using a three-point scale. A continuous scale with just two anchors in the extremes in such cases is ideal."

It can often make more sense to use a

continuous scale (a visual analogue scale) with no defined 'points' because they can appear to offer a greater range and sensitivity to responses.

A study measuring people's happiness, conducted by Raphael Studer and Rainer Winkelmann, economists at the University of Zurich, used a randomised trial to tease out how responses differ between the two scales. More than 5,000 Dutch households participated in the surveys.

Half of respondents were asked to report their happiness on a Likert scale and then – a month later – on a visual analogue scale (VAS). Others were given the VAS first and the Likert scale a month afterwards.

Although responses were broadly similar across the two types, there were notable differences too. Responses to the Likert scale tended to cluster around seven and eight (out of 10) – positive but avoiding extremes. In comparison, the VAS attracted a greater variety of responses and were more spread out; although the usual findings came up – the middle-aged were less happy; the married were happier – the size of each effect appeared greater on the VAS.

One question may prime the answer to a later question

We know the information we need to gather, but what order should we put it in? Does question order affect responses, and, if so, how?

Researchers have found that responses to a questionnaire may be biased by what is most available in people's memory of the interaction, rather than based on balanced recall. Whatever is 'front of mind' when answering a question may bias people's response.

Let's look at research conducted into the impact of the conflict resolution organisation Seeds of Peace. It brings together Jewish Israeli and Palestinian teenagers in a US camp to increase awareness of the two groups and build lasting friendships.

Border walls between Israel and Palestine mean an entire generation is growing up not knowing the other group. Yet, at the camp, two in three Seeds of Peace campers form at least one friendship with their respective outgroup while at camp, which typically leads them to feel more positive towards Israelis or Palestinians as a whole.

Researchers designed a survey to measure the impact of the camp on positive feelings and increased openness toward Jewish Israelis/Palestinians. They tested the impact of question order on ratings of positivity toward the outgroup. Asking campers if they had made an outgroup friendship first, before asking them to rate positive feelings toward the outgroup in general, led to higher positivity ratings.

Conversely, initial questions that create a negative frame of mind can skew answers in the other direction for later questions.

Gallup used two different question orders in the Gallup Healthways Wellbeing Index – a daily telephone poll of 1,000 randomly sampled Americans to assess subjective wellbeing. In 2009 to 2010 – an era where many were unhappy with the political situation – first asking the questions about political satisfaction dramatically reduced reported life satisfaction in subsequent questions.

Nobel Prize-winning economist Angus Deaton says: "People appear to dislike politicians so much that prompting them to think about them has a very large downward effect on their assessment of their own lives; over the 111th Congress (2009–2010), only 25% of the population approved of Congress. The effect of asking the political questions on wellbeing is only a little less than the effect of someone becoming unemployed; to get the same effect on average wellbeing, three-quarters of the population would have to lose their jobs."

The four insights discussed above can give us a new understanding and more rigorous framework for thinking about how we design questionnaires to elicit the most accurate customer insight or opinion. On the other hand, it could also give insight into how some may be manipulating insight and opinion by design. ■

Crawford Hollingworth is co-founder of **The Behavioural Architects**

THE CHOICES WE MAKE

IF A CONSUMER HAS MADE UP THEIR MIND ABOUT A BRAND THEY WANT, ONE MIGHT ASSUME THAT FAILING TO FIND PERTINENT INFORMATION ON THAT PRODUCT WOULD NOT DETER THEM. BUT RESEARCH IN THE US POINTS TO THE OPPOSITE.
BY JANE BAINBRIDGE

Access to information, personal preference, existing knowledge, a communications prompt, an already established loyalty; the reasons people decide on a particular brand for a product or service they want to purchase are varied.

One might assume that consumers with a strong prior preference apply reasoning that will bolster this preliminary choice – and, indeed, some research has pointed to this.

But what happens when important information needed to complete the purchase is missing during this pre-purchase research period? How will their strength of opinion for their first choice affect their reaction to missing information?

Research carried out by a team in the US has suggested that those with relatively stronger prior preferences for a product are more likely to abandon it than those with weaker prior preferences.

The researchers looked at how preference strength plays a part because those with relatively stronger prior preferences experience more cognitive dissonance when information on new attributes is missing on just the first choice, but not on its competitors.

Caglar Irmak, associate professor, marketing at the School of Business Administration, University of Miami, in the US, led the research, and explains why they embarked on it. “I was looking at confirmation bias and how people make inferences about missing information. Prior research has shown that – when people have an option they prefer – they infer the

value of the missing information on the option they prefer in a way to confirm their preference [confirmation bias].

“For example, if I have an iPhone and would like to buy the upcoming iPhone 8 – and Apple does not give information about iPhone 8’s power use – I would infer that it should be better than its rivals, such as Samsung Galaxy. I was interested in the factors that would reverse this effect, such that those who prefer iPhone, in the example above, would be more likely to switch to Galaxy if there is missing information on an attribute.”

So, interested in what would reduce the confirmation bias, Irmak started to carry out some studies.

“To be honest, I expected stronger preference to lead to less switching, as confirmation bias would predict. I measured preference strength as a secondary measure; it was not my focus when I started this research,” he says. “Then, I realised preference strength could be the factor I was looking for, as I repeatedly found that people with stronger preference are more likely to switch to a competitor after encountering missing information on their initial choice. So this was more like a serendipitous finding.”

The initial experiments were run with Irmak’s students in class, using paper-and-pencil surveys. “I gave them the purchase scenario and choice situation, and they made their choice based on the information offered to them. Later, we conducted studies on computers in the behavioural laboratory that included hypothetical and real products.”

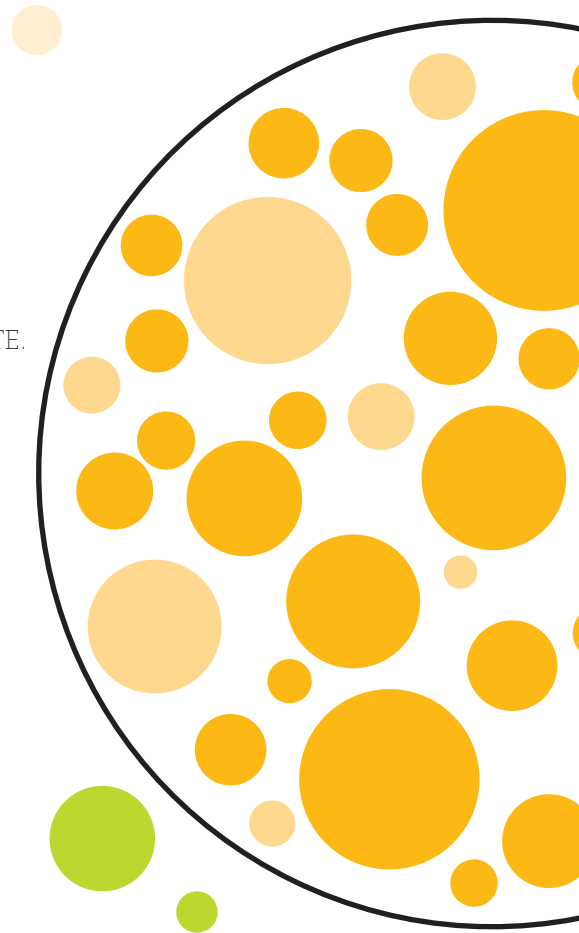
If a person has already made up their mind, judging information on the product tends to be biased by

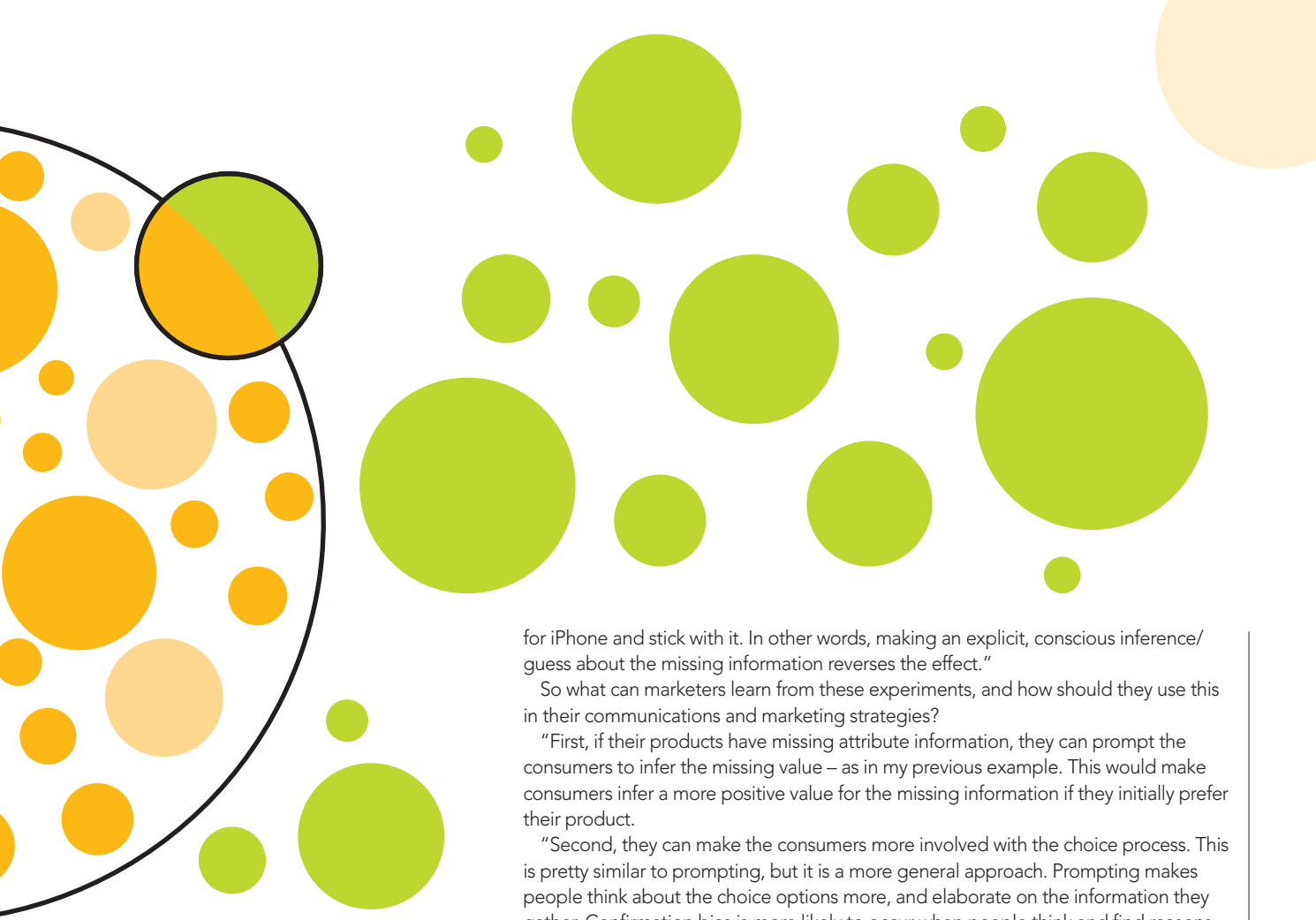
motivated reasoning. However, the researchers found that people are more likely to abandon – rather than bolster – their initial choice when choosing from sets where only the first preference has incomplete supportive information.

A contrast arises between consumers’ naturally negative reaction to missing information specific to their preferred choice. The inconsistency leads to cognitive dissonance – discomfort when holding inconsistent thoughts, beliefs or attitudes about an option.

While the researchers expected consumers to use motivated reasoning – a cognitive process – to bolster the first choice when the field isn’t dominated by the completely described competitor on the shared attributes, what actually happens is that they abandon it because of negative effect.

So does the increased tendency for abandonment mean they give up on the purchase entirely, or switch to a competitor? “We got both types of





results [abandonment of choice and switching to a competitor]," Irmak says. "In some of the experiments we did not report in the paper, we gave participants a 'no-choice option', and – in line with our theory – people with stronger preferences were more likely to pick that option when it is provided.

"Essentially, missing information on the initially preferred option turns off those with a stronger preference for that option. As a result, they abandon the purchase or switch to a competitor."

In some of the tests, the researchers prompted consumers in the process by asking them to infer the value of missing information that affected the outcome.

"In the Apple-Samsung example, for instance, if the salesperson realises you don't like the fact Apple doesn't provide information on a key attribute, they may ask you what you think the power use rate would be for the iPhone [that is, prompt you to infer the value]. You are more likely, then, to infer a positive value

for iPhone and stick with it. In other words, making an explicit, conscious inference/guess about the missing information reverses the effect."

So what can marketers learn from these experiments, and how should they use this in their communications and marketing strategies?

"First, if their products have missing attribute information, they can prompt the consumers to infer the missing value – as in my previous example. This would make consumers infer a more positive value for the missing information if they initially prefer their product.

"Second, they can make the consumers more involved with the choice process. This is pretty similar to prompting, but it is a more general approach. Prompting makes people think about the choice options more, and elaborate on the information they gather. Confirmation bias is more likely to occur when people think and find reasons to purchase their initially preferred option.

"Telling consumers how important this choice is, for example, would make them more involved with the purchase decision. Again, with the Apple-Samsung example, by telling consumers that they will live with their new phone for at least two years – and use it every day many times – would emphasise the importance of the decision and increase involvement with the purchase decision. Involvement, in turn, will increase their likelihood of inferring the missing value in a way to support their initial choice."

So what research needs to be done to build on these findings?

Irmak points to the need to look at the role of emotions in more depth. "The interesting part here is that emotion in our research was about risk feelings. People felt more risk when they received missing information on a strongly preferred option and switched to a competitor as a result," he says.

"However, emotions might also make people more involved in certain occasions. People may realise that the decision is an important one after feeling concerned or nervous. This may end up reversing the effect we demonstrate in our research if sufficient time is given to consumers."

For purchases that people care a lot about, the stronger the preference, the more likely they are to stay with their initial choice. "Our research is interesting in that – when strong preference is coupled with low-involvement purchases – missing information may backfire," Irmak says. ■

Choice under incomplete information on incumbents: Why consumers with strong preferences are more likely to abandon their prior choices, by Caglar Irmak, Thomas Kramer and Sanker Sen, *Journal of Consumer Psychology*, 2016



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RICHARD THALER IN SEVEN

RICHARD THALER IS AN EXPERT IN BEHAVIOURAL ECONOMICS AND FINANCE, AND THE PSYCHOLOGY OF DECISION-MAKING. HE IS CO-DIRECTOR OF THE BEHAVIORAL ECONOMICS PROJECT AT THE NATIONAL BUREAU OF ECONOMIC RESEARCH. IN 2008, WITH CASS SUNSTEIN, HE CO-WROTE *NUDGE*, WHICH LAID OUT CONCEPTS OF BEHAVIOURAL ECONOMICS TO TACKLE MANY OF SOCIETY'S MAJOR PROBLEMS



1 When you wrote *Nudge*, did you anticipate the degree to which it would affect public policy, and it being used as the foundation for units such as The Behavioural Insights Team in the UK?

No way! When we proposed the book there was little interest from publishers, so we ended up with a sleepy university press that had no expertise or interest in publicising the book. We just hoped it might find an audience via word of mouth, but never in our wildest dreams did we think it might be approaching a million books sold around the world, much less the impact it has had on policy-making. When Cass and I think back on it we just shake our heads and mutter 'amazing'.

2 Do you think we needed a global recession like 2008 for people to seriously question economic theory?

No, I don't think the financial crisis had much to do with the book's success. It is about microeconomics and psychology, not macroeconomics and financial policy. I suppose the financial turmoil might have made some readers more open to new ideas, but I don't think it was key.

3 Has behavioural economics (BE) won the argument that more traditional economic theory relies too much on assuming rational behaviour?

A lesson I learned from President George W Bush is never to declare 'mission accomplished!'. We are far from that. Personally I think, for much of the economics profession, the move has

been from 'Thaler is certainly wrong' to 'Well, maybe he has a point in some circumstances'. Certainly, the way introductory economics courses are taught has barely changed. Now, at most, there is a day devoted to 'anomalies'.

4 What area of public policy is rife for some nudge techniques at the moment?

What isn't? In the US, there is great potential for thinking about the health care crisis using behavioural economics. We spend about one in six dollars of our income on health care, much more than any other country and have, at best, mediocre results. Traditional solutions have failed. We need a complete rethink. The traditional economic prescription of giving consumers more 'skin in the game' is far from a panacea – in part because consumers have little ability to make good decisions. When facing high deductibles, for example, they cut back a bit, but some of the reductions are on highly efficacious treatments and they do virtually no 'shopping' because doing so is extremely difficult. There are also ripe opportunities to rethink macroeconomics from a behavioural perspective – a research agenda that is in its infancy.

5 During your career has anyone challenged your research, or raised concerns to such an extent, that you've changed your position or opinion?

All of my research has been heavily scrutinised, and referees have rarely

been enthusiastic about early drafts so I have been forced constantly to revise and rethink the way I conduct and describe my methods and results. Every paper changed during the publication process, but I have never been convinced to alter substantially the original research agenda that is laid out in my first behavioural paper published in 1980 – a paper that took about four years to get published.

6 While BE has been used so effectively in public policy for the good, do you worry about businesses adopting it for purely commercial gain?

Absolutely, and I have written about those worries. When anyone asks me to sign a copy of *Nudge* I write 'nudge for good!', which is meant as a plea not an expectation. We did not invent nudging; Ponzi and Madoff did not read our book. I teach my students to use choice architecture responsibly. It is up to them whether they follow that dictum. Meanwhile, *caveat emptor* still applies.

7 Are there techniques individuals can learn from BE to improve their own decision-making?

Absolutely. Every technique that can be used to nudge for good can be applied to your own behaviour. I call such efforts 'snudges' – as in self-nudging. Two of the original members of the UK Behavioural Insights Team (aka Nudge Unit), Owain Service and Rory Gallagher, have written an excellent book on this topic called *Think Small*. ■

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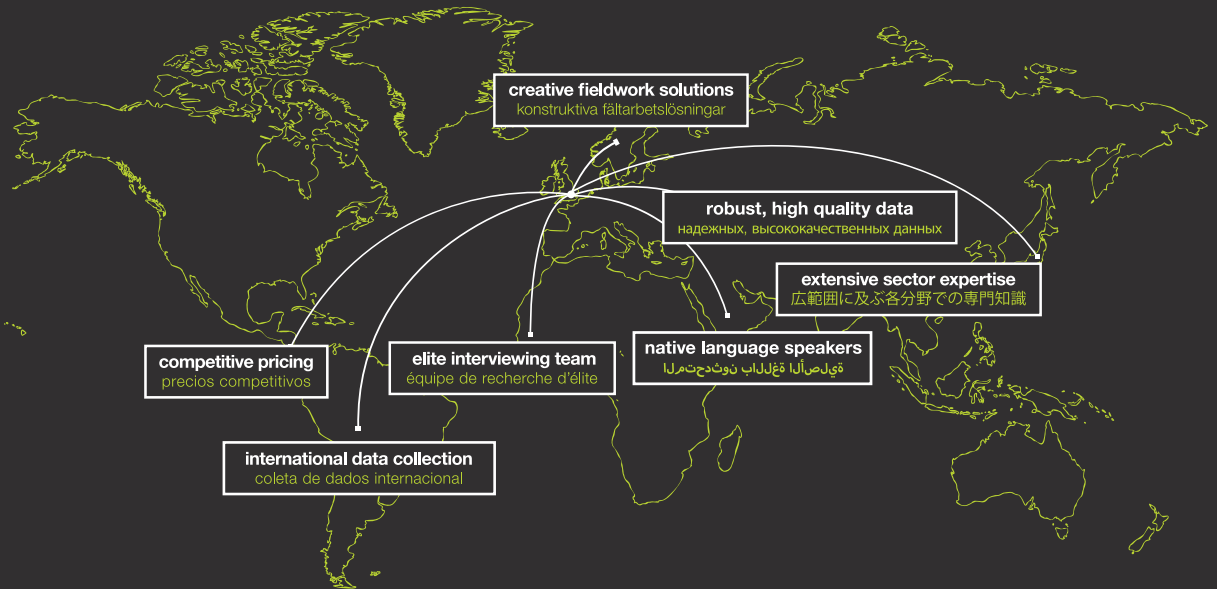
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ADVICE FROM ABOVE

THE MRS HAS LAUNCHED ITS MENTORING SCHEME, WHICH PAIRS MEMBERS WITH MORE SENIOR MENTORS TO HELP THEM NAVIGATE WORK AND CAREER ISSUES.

JANE SIMMS REPORTS

“Getting free impartial advice and coaching from someone in the industry who you can learn from and be inspired by – what’s not to like?” That’s not the blurb on the MRS website about its new mentoring scheme, but the response of a mentee when asked why they got involved. Another said: “I was going through a really tumultuous time at work and needing guidance, when an email about the scheme popped into my inbox. It looked too good to be true, and I looked for the catch – but it’s proved to be the light at the end of the tunnel for me.”

The scheme matches

members – who are looking for support and advice with their work, career and even work-life balance – with experienced senior professionals in the research sector who can help them to grow professionally and personally. It’s open to all MRS members as a free membership benefit, and mentees are paired up with a certified member or fellow whose experience best meets their requirements.

Mentors offer neutral and objective support, and mentees work with them, in confidence, over a period of six to

12 months. But the benefits don't just flow in one direction.

People typically become mentors in order to 'give something back' to the profession. They don't get paid, but they gain more from the relationship than the satisfaction of seeing their mentees progress and flourish, as Helen Clark, director of research agency Waves, explains: "I've been running my own [small] agency for 10 years, so mentoring people in other parts of the industry stops me being insular and keeps me on my toes.

"I have 25 years' experience on both the agency and client side, but my mentees ask me questions that challenge my own thinking. However experienced we are, we don't know it all."

Indeed, another mentor, Keith Bates – who has followed a similar career path and now runs his own small company, Routes to Growth – believes "it's really important that mentors don't automatically assume that the way they've done things is the right way for this particular person in this particular situation". He admits he's been "pleasantly surprised" at just how much he's learned from the relationship with his mentee.

There have been surprises on the mentees' part, too. Laura Morris, a director of market research agency Trinity McQueen, says: "I initially wondered if it might be seen as a backward step – that maybe mentoring is for more junior people. But I quickly realised how valuable it can be for people at any age – anyone, at any level, can learn and develop."

At the point she applied to be a mentee, Morris was starting to think about her career progression and long-term future, and what steps she could take to prepare her for that.

Mentoring can help people at the start of their careers too, as Matthew Langin, research coordinator at education and employer marketing business SMRS, discovered. One

thing that the scheme has revealed to him is that his stereotypical view of a research person as "introverted and difficult to talk to" was flawed. "I was concerned, because I knew I didn't fit that mould – but when I met my mentor, I realised she didn't either, which gave me confidence to be who I was," Langin says.

The MRS helps both parties establish clear rules of engagement, including how often to meet and what the mentee wants to achieve.

"My mentor and I agreed that monthly meetings were too much, mainly because I wanted time to reflect on – and put into practice – what we discussed in one session before moving to the next," says Morris. So the pair meet every six to eight weeks, which is typical, for between one and half and two hours. They talk over coffee, while others meet for lunch.

The mentees typically prepare an agenda and, afterwards, write up the session, including any action points that are agreed. "It isn't just about having a nice little chat," says Clark, adding that the mentee has to "take ownership" of the relationship.

Critically, both sides have to understand that the role of a mentor is not to tell mentees what to do, but to help them work it out for themselves.

"I'm a facilitator," says Clark. "However, I often find that the individual has worked it out for themselves before I say anything – simply 'verbalising' the issue in a safe environment can be beneficial in itself."

Bates agrees. "The answer is often in the question the individual asks," he says. However, while non-judgemental listening is very important, "you need to gently challenge too", he adds.

It's this challenge that Morris has found particularly helpful. "You can operate in a bubble in your agency, so having someone external ask questions such as 'Why do you spend so much time on this aspect?' or 'How is that helpful?' really makes you look at what you do."

Being a mentor is not for everyone; Clark believes that people who don't have a natural 'facilitating' style might find it difficult, and Bates admits: "You do have to bite your tongue sometimes. It would be very easy to jump in with 'solutions' – especially if that's what the mentee is looking for."

Langin was looking for help because he had just landed his first job in a small insight team when his two managers left, leaving him with a heavy workload, little guidance, big stakeholder personalities to manage and skills gaps that he knew he needed to plug.

Over the past six months his mentor has helped him build his quantitative analytical skills, reassured him that he is asking the right questions in research, advised him on how to manage his stakeholders more effectively, and gently suggested that he should be looking for a promotion by the end of the year. "As a result I feel much more confident and I think people in the agency respect me more," he says.

Morris believes her mentor has not only helped her focus her thinking about her future career – "I might have drifted otherwise" – but has also prompted her to shift the balance of her activity towards spending more time "at the coalface with clients – so, perhaps, building my own profile as well as that of the agency as a whole".

Mentors and mentees are overwhelmingly positive about the scheme. Mentees are mindful that their mentor's time is precious, and only ask for advice between face-to-face sessions when it's absolutely necessary – and then usually by email. The only potential limitation from the mentees' perspective is the time constraint; they find mentoring so valuable that they would like the relationship to continue – but, for now, they couldn't be happier.

"To be honest, the scheme has exceeded my expectations," says Langin. ■



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'IT'S NOT BRAIN SURGERY'

ANXIETY IN THE WORKPLACE CAN BE DEBILITATING – BUT, WITH THE RIGHT TECHNIQUES, IT IS MANAGEABLE. **MICHAEL BROWN** SHARES HIS EXPERIENCES AND TIPS FOR MARKET RESEARCHERS COPING WITH STRESS

I've worked in several market research roles – in fieldwork (Research Now), full-service research (MESH Experience) and in media (UM London). Each has involved seasons of varied kinds of stress – mainly, the healthy kind, that a previous boss called the “growing edge” – keeping comfort zones at bay and experiencing growth.

Throughout my career, however, there have also been moments when delivery pressure transcended from healthy, productive stress into brain-cramping, sleep-snatching, cuticle-massacring stress. The common chorus among those around me during these moments was “come on now, it's not brain surgery... it's only market research”. But this can feel a scant comfort when faced with an imminent deadline.

The frequent purpose of our output – to quantify business performance and illuminate best steps to improve it – means a great deal can hinge on the reports we deliver. By its very nature, our industry is given to highly pressurised delivery –

after months of work, everyone is looking to our team to deliver the crescendo of an 'a-ha'.

A news story stayed with me from last year. It was about Professor Johannes Haushofer, a Princeton academic, who published a CV of his career failures to “balance the record” and encourage others to persist when faced with disappointment. Inspired by his candour, I'm going to share a story with you.

A few years ago, at the very start of my job at UM, I charted a series of datapoints using an incorrect base. The data was not part of the final debrief, but in an early read that our client had requested. Unfortunately, it made its way to the very top of my client's company, and one of my incorrect data points went on to be shared at a board meeting. It was the stuff of nightmares – I felt I had let everyone down. Once I realised – and while I was preparing the full debrief – I immediately flagged it with our client. It was a tense call, but, again, “it's not brain surgery; no-one died on the table”.

Crushed by this misfire, low-level anxiety – which I had been feeling during a busy spell at work – worsened into medical anxiety. I woke up one Monday morning three years ago unable to go to work. I went to my GP and explained I'd been struggling to sleep, and that I felt continuous, nauseating worry. He offered to write a letter that would allow me to be off work for a fortnight, but it didn't feel like a good solution.

Instead, I accepted another proposal from the doctor – cognitive behavioural therapy (CBT). I explained all to my boss and they were very understanding, saying that honest mistakes are inevitable and to take the time to focus on feeling better. I appreciate not everyone is that lucky, but it is always worth talking to your boss – and your employer does have a duty of care. It took two months to complete the CBT and around two years fully to shake the low-level anxiety.

The experience made me a stronger professional. If you're a manager or client reading this, I'd urge you to consider this a tale 'from the other side', and to engage empathy when dealing with scenarios such as this.

There have been many articles on the virtues of mindfulness and exercise in beating stress, but I have some tips that are more specific to market research.

Manage robustly: The best way to avoid mistakes is to factor enough time into a reporting timeline. This can take guts, as clients invariably want to deliver insights to their businesses without delay, or to meet critical deadlines. Sometimes, it won't be possible to follow a sensible timeline; in these cases, project teams should be kept energised to work intensively and out of hours, with the prospect of a breather once delivery is done. Late-night pizzas can make a charting spree more palatable.

Own it: If a mistake has happened, one of the most empowering things you can do is to take responsibility for it. This is the hallmark of a professional who is secure in their skills. If the thought of owning up seems inconceivable, you're probably working in the wrong place, and it is likely that blame is systemic at all levels of your organisation.

Mission: Recovery. If the mistake is similar to mine, create a team of two to three data checkers to divide up a deliverable and systematically ensure the entire report is error-free. The feeling of confidence you'll have when re-issuing the corrected deliverable will be vital in moving on.

Find a friend: Find someone at work you like and trust, and talk over the problem with them. Ideally, it should be someone familiar with the client context. Worried conversation can drain others' energy, so try to have one focused discussion rather than multiple chats. Ideally, consult them off-site, so



▶ your work-space doesn't become coloured by heavy worry, and to help with objectivity.

Avoid spirals: Once problems are verbalised, try not to talk about them over and over, as the cyclical effect of this can create a feeling of hopelessness. Don't load more people than necessary with your predicament – not least because telling half the office will perpetuate and amplify the issue.

Recruit a Yoda: The episode I described gave rise to me gaining a mentor. I briefed the senior account lead for this client – a managing partner at my agency – who shared helpful, wise words that made a big difference to my being able to move on.

The power of eggs: Forge human business relationships. Don't be a faceless name in an inbox. Spend the time and money to build meaningful rapport with your clients. Don't be afraid to show them how much you care about their brands and their business. If clients know you are doing your best – and that you're a partner rather than simply a supplier – they should be much more likely to empathise if an honest mistake is made.

Guard your time: Block out time in your work calendar (say, one evening a week) when you leave the office on time and do something that pleases you. Diversifying your interests and spending your time in a rewarding way, will give you a feeling of ownership of your time and peace of mind.

Landmark moments: Study your typical morale and energy trajectory across the year, and book holidays accordingly. Stave off morale slumps by punctuating the year with exciting plans and trips. ■

Michael Brown is insight director at UM London

THE JOB MARKET

MIND THE GAP

When I did my gap year, in 1996, I had graduated and been working for two years. My gap year involved a combination of travelling and working in Australia and Asia. It was fun, and I met lots of friends and gained stories for life... but that's a tale for another day.

I hadn't given work much thought until the last few weeks of my trip, when – by chance – I met someone who worked in market research. It was the first time I had ever heard of market research and insight. Little did I know how my life was about to pan out.

At the time, back in the good old days, there was no email/mobile/FaceTime – so it really was a gap from everything for a year. I did it because I didn't know what I wanted out of life, but I knew I really wanted an adventure, and I wanted to be as far away as possible from everything I knew. At the time, I didn't give a second thought to my future or my CV.

It's different now; the world is small and you, a family member or a friend on their gap year can share every moment of every day – so the distance between 'real life' and the 'gap experience' isn't so big. No need to queue up at random post offices in strange towns in Australia in case someone may have sent you a letter.

This may be part of the reason that the gap year has changed format, and now means something different. People tell us they took one because it was good for their CV – so it now has an agenda. In some cases, it's almost compulsory, and is funded by the Bank of Mum & Dad.

“Will it be more valuable for your CV if your 'gap' involves taking a year out to teach at an orphanage, volunteer on a farm, or build a school? Do these things stand out over a long holiday?”

There is also a different level of consciousness when planning your gap year – put the term into a well-known search engine and you get a list of volunteering options, work opportunities, and a constant list of people selling life experiences.

So has the gap year become a bit of a cliché, and when do you take it? After school, university, your first job, your second job? Will it now be more valuable for your CV if your 'gap' involves taking a year out to teach at an orphanage, volunteer on a farm, or build a school? Do these things stand out over a long holiday?

I don't believe one thing is more valuable than another; each person has a different requirement of their gap experience and – as long as you make the most of it – your career and your life will benefit. Just make sure you do it for the right reason.

In recent times, gap years have tended to take place before university, because – once the student has incurred the debt of their higher education – they are pretty keen to get to work.

It's still good to see it on a CV, as it does demonstrate that the person in question has an adventurous streak and won't always play it safe.

However, it's not for everyone, so don't feel the need to follow the crowd at 18 or 22 – you may decide to take your gap year in your 30s or 40s, and it will be just as valuable an experience then.

Sinead Hasson is founder and managing director of recruitment consultancy Hasson Associates.





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FRAMING RESEARCH UNDER THE GDPR

IT'S COUNTDOWN TO THE GENERAL DATA PROTECTION REGULATION AND **DR MICHELLE GODDARD** GIVES AN UPDATE ON THE AREAS RESEARCHERS NEED TO THINK ABOUT

Were less than a year away (25 May 2018) from full entry into the EU General Data Protection Regulation (GDPR), so authorities and legislators across the European Union are starting to give us greater guidance for this new era of data protection.

For researchers, especially those in the private sector, key questions remain about how personal data collected for research purposes should be treated under the GDPR:

- Do research purposes offer a separate legal gateway for processing personal data?
- Is commercial research treated the same as other scientific research?
- How likely is there to be consistency across the EU?

GDPR SETS UP AN EU-WIDE RESEARCH REGIME

The GDPR research regime operates at both EU and national level, and applies to processing for archiving in the public interest, scientific, historical and statistical-research purposes.

Across the EU, the Article 89 research provision expressly allows:

- Broad consents for scientific research where consent cannot be secured for all specific purposes at the outset of data collection
- Further use of personal data for scientific or statistical research as a secondary compatible purpose
- The right of data subjects to object to the processing of personal data for research purposes (unless necessary in the public interest)
- Restriction of the right of a data subject to exercise their 'right to erasure' if it is likely to significantly impair processing for scientific research purposes
- Relaxation of the storage-limitation principle, granting the data controller the ability to store personal data for longer periods
- Isolated transfers of personal data to third countries, taking into account legitimate expectations of society for an increase in knowledge.

Additionally, researchers – processing for scientific research – do not have to fulfil all the information obligations, if this would involve a disproportionate effort in

contacting research participants. When considering proportionality, look at factors such as the number of data subjects and the age of the data.

Use of Article 89 is subject to certain conditions:

- Appropriate safeguards to protect the rights and freedoms of the data subject
- Adequate technical and security measures, entrenching the principle of data minimisation and using, as a default, pseudonymised data – that is, personal data that has been processed so it cannot be attributed to a specific subject without the use of additional information, such as a unique identifier
- Compliance with recognised ethical safeguards.

We expect researchers will still need a legal gateway to collect personal data – such as consent or legitimate interests of the data controller – but contrary views have been posed and regulators will need to answer this.

NATIONAL FLEXIBILITY FOR RESEARCH

The research regime also allows EU member states to make additional specific provisions on:

- The ability to process sensitive

categories of data – national legislation can confirm that scientific research is legal processing grounds for use of this type of personal data, and provision can be made to allow criminal-convictions data to be used in research

- Restrictions on five individual rights – the rights to: access data, rectify inaccurate data, restrict processing and object to processing, and the right of a child to be forgotten can be restricted for research purposes (if necessary for the processing). Each member state can choose which individual rights will be limited in their national law and can independently decide to limit all, none, or some of these rights.

WHAT OF THE UK?

The Department for Culture, Media and Sport launched a consultation earlier this year to gather views on how the UK government should exercise its flexibility in implementing

the GDPR. A bill setting out the views of the government is yet to be tabled, but it is hoped that any legislation in this area will:

- Set out clear requirements that make specific provision on processing sensitive data and establish restrictions on the five named individual rights
- Provide clarity that commercial research is within the research regime and a broad interpretation of scientific research purposes
- Explicitly include industry codes of conduct within GDPR-acceptable and recognised ethical safeguards.

We expect the research regime will be applied consistently across the EU, especially the general conditions and safeguards that are put in place for processing. Indeed a harmonised and consistent framework for research across the European Union will also be valuable for the UK to demonstrate adequacy after its formal withdrawal from the EU.

Policy-makers should bear in mind that commercial research already has a strong ethical framework that is responsive to key external changes and keeps pace with technological developments – while placing research participants' rights at the core. The MRS Code of Conduct and self-regulatory scheme has been in existence for more than 60 years. It has evolved to ensure that the standards are fit for purpose in maintaining professional standards, enshrine the rights and wellbeing of research participants, and encourage best practices that go further than legal compliance.

In this new environment, researchers must be able to build on this to continue carrying out innovative research for commercial and overall societal benefit. It will be interesting to see what final decisions are made on the new regime. ■

Dr Michelle Goddard is director of policy and standards at MRS



Prediction and uncertainty

I am so glad I left the writing of this until after the General Election. At least I can confirm one thing in this sea of uncertainty we are left in: there is currently no intention to hold a poll enquiry!

The Conservative Party manifesto did include a section on digital security, with a clear commitment to greater regulatory intervention and controls, particularly online. We are not yet clear how these commitments align to the General Data Protection Regulation. It may well be that current political realities mean this set of commitments do not make it to the legislative agenda. Watch this space...

With political uncertainty making prediction - and its many challenges - an even hotter topic than usual this year, the MRS Delphi Group felt it was in the interests of the sector to look at how customer-focused businesses plan, and deal with, uncertainty. Visit mrs.org.uk/delphi for more on this.

Whether it's opinion polling, scenario planning, artificial intelligence, or looking into a crystal ball, one prediction is sure to be true - humans won't ever lose their desire to look into the future.

So, what's to come in the remainder of the year? Government procurement is back on the agenda and we will be lobbying government on behalf of the sector as it conducts Brexit negotiations. There will be the usual blend of stimulating social events, training and conferences (see calendar opposite). You are also certain to hear more from our new president, Jan Gooding, profiled in this issue, who laid out her vision for greater inclusion in the research sector at this year's annual conference. You can read Jan's speech here mrs.org.uk/jangooding.

I look forward to seeing many of you at the MRS Summer Party but I won't be foolish enough to predict sunshine. Let's just hope...

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MY SOCIETY



MRS Gold Medal

MRS' rarest accolade has been presented for the first time since 2008 to Dr Barry Leventhal as he steps down after 25 years as chair of the influential Census and Geodemographics Group (CGG).

The gold medal has only been awarded nine times. Previous recipients include Professor Sir Roger Jowell, Tony Cowling and Dr Elizabeth Nelson, who recommended Leventhal for the honour.

"Barry was key in negotiating with ONS to enable MRS to develop the social grade algorithm and has personally represented the profession at consultations with ONS and government about census data for more than a quarter of a century," says Nelson.

Dr Emma E White, associate director (operations) at Southampton University, will become chair of CGG.

Calendar

Member events

July

- 13 – Market Research Benevolent Association Golf Day
- 13 – Getting under the skin of human behaviour
- 27 – MRS Summer Party

September

- 07 – Best of Impact 2017 comes to The Lowry, Salford
- 14 – MRS Operations Awards at Revolution London
- 26 – Semiotics and intelligent content at Radio 4

Training highlights

September

19 – Nailing the business issues

Understand the wider context and pressures having an impact on businesses and the tactical priorities of its stakeholders.

21 – Effective advertising evaluation

Advertising effectiveness research from the simplest studies to multimedia, including guidelines and tips for best practice.

26 – Generating business through LinkedIn (NEW)

Find out why the traditional approaches are failing and how you should be using LinkedIn in a strategic way to create new business.

28 – Enhancing the value of clientside research

Best practice strategies and skill sets to improve the effectiveness and impact of market research/insight within your organisation.

Conferences

September

- 21 – Utilities Research

Find out more at mrs.org.uk/events

Excellence awards and fellowships

The personal contributions that make the research sector a great place to work were recognised at the sixth annual MRS Excellence Awards on 9 June.

The following became MRS Fellows:

Keith Bates	Fiona Blades
Michael Herbert	Sofie Mallick
Jackie Megahey	Virginia Monk

MRS Honorary Fellowships were awarded to Professor Patrick Sturgis and Dame Dianne Thompson.

Winners of the MRS Annual Conference Awards were also announced, as well as the *IJMR* Collaborative Research Award.

For all the winners visit mrs.org.uk/excellence2017

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Where next?

You've reached the end of *Impact*, but there's plenty more original content to enjoy in the MRS's family of publications, including Research Live and *IJMR*

RESEARCH-LIVE.COM



Listen with empathy

One-on-one interviews can elicit strong emotions in respondents, and qualitative researchers should be trained to navigate these moments with sensitivity. Lucie Holliday, of Lucidity Research, offers some key techniques.

www.research-live.com/empathy

Face up to the complexity of research

When brands survey their customers, they become narcissists, says Rebecca Brooks of Alter Agents. Research must abandon models and be designed to meet not only customer needs, but also specific business challenges.

www.research-live.com/complexity

The new visual language of consumers

Communication is becoming more visual, as demonstrated by the popularity of platforms such as Instagram and Snapchat. Researchers overlooking visual data would miss out on a rich source of insight, says Nick Gadsby of The Answer.

www.research-live.com/visual-language

Embracing failure leads to success

Lesley Salem of Razor Research writes about a recently opened Swedish museum, dedicated to failure. The museum explores reasons for failures and uses mistakes as opportunities for learning.

www.research-live.com/embracing-failure

IJMR

Impact of word of mouth on intention

Robert East, Jenni Romaniuk, Rahul Chawdhary and Mark Uncles measure how the impact of positive and negative word of mouth is related to the receiver's intention to purchase brands.

www.mrs.org.uk/WOM-intention

What's next for qualitative research?

Kirsty Fuller, former CEO of Flamingo, gives her thoughts on the current state of qualitative research, and what the future of the practice could look like.

www.mrs.org.uk/what-next

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DON'T LEAVE **YOUR NEXT** **APPOINTMENT** TO CHANCE

If you're a candidate interested in a move, there's always the possibility that amongst the vastness of professional network sites and abundance of fake news, your profile will be picked by a recruiter who's ready to offer you your dream job or just waste your time ... again.

On the other side of the coin, when you're recruiting for your own team and trawling the 200 million active profiles on the web, you hit on the one you're looking for. But you're either met with a stoney silence or worse still you go through the recruitment process before realising they weren't looking and had no intention of moving job. All you end up with is a lemon.

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