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USING EVIDENCE & INSIGHT TO MAKE A DIFFERENCE

How brands can use technology to maintain a constant dialogue with customers

Tracking changes

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All inclusive

Jane Bainbridge
Editor

What we need is bloody-mindedness. Sometimes we have to believe what we're doing is right and press on. So said Karen Fraser during the conscious marketing session at last month's MRS annual conference, Impact 2018 (p23), where research and the arguments for inclusion were explored.

The evidence supports that resolve. If you're not won over by the human rights aspect of inclusion, or you don't feel particularly altruistic about it, how about following the money? McKinsey found that gender and ethnic diversity were clearly correlated with profitability – having a more diverse workforce is beneficial to your bottom line. Maybe it's no coincidence that some of the companies at the forefront of embracing an inclusive agenda are banks.

Opinion is on their side. Lloyds Bank research found that two-thirds of people wanted advertising to be more diverse and 65% said they regarded diverse brands more warmly.

But many are still at the talking, rather than the doing, stage. Because even if the will is there, the doing is really difficult, as Aviva's inclusion director and MRS president, Jan Gooding, admits.

Momentum is building and, even if it slips down some businesses' agendas, it's not going away. Once your eyes are opened to how exclusive so many firms are in their hiring and communications, they don't close again.

I spend more time than many, I suspect, on companies' websites for research and I can't tell you how often, when I click on 'who we are' sections, I'm presented with row upon row of white men. Frankly, it's depressing.

And inclusion really does mean everyone; it's not just gender, sexuality, ethnicity, disability …how about regionality (p44) and neurodiversity (p81)?

Business should learn its lesson from history; remember 'greenwashing' when brands would make unsubstantiated environmental claims? Don't dare try to project an inclusive image if you're not living it in your own offices.

Changing ingrained hiring practices to be less discriminatory isn't easy; but it must be done. No-one can claim surprise when they get singled out for their gender pay gaps or lack of diversity.

And those rows of white men need to want this too. I was heartened by the agency boss who admitted to me that he wasn't going to come to the inclusion session, and then realised he must, as it mattered to his business. This is everyone's fight and the benefits aren't ring-fenced.

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GLOBAL BRIEFING

SPECIAL REPORT

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Unasked questions

How many hours are spent annually trying to answer the question 'Why do people drink Coke rather than Pepsi?' My guess is that it runs into five figures. Added together, millions of hours must be spent each year in debating the minutiae of consumer choice – or in pursuing hair-splitting distinctions between competing brands. But there's another category of questions that never gets asked because we assume we know the answer – and, often, we assume this because of the lazy use of the word 'why?'

Interestingly, evolutionary biologists are very careful about questions that start with 'why', because they know they can be answered on different levels. 'Why do we drink when we are thirsty?' can be answered with anything from 'because it's enjoyable' to 'because organisms possessed of a drive to stay well hydrated enjoy a fitness advantage, enabling them to outcompete those that don't'.

Biologist Ernst Mayr argued in 1961 that biology contains at least two fields – the proximate and the ultimate – which differ in their choice of, and approach to, research problems. On the one hand, he recognised functional biology, the practitioners of which "are vitally concerned with the operation and interaction of structural elements, from molecules up to organs and whole individuals. Their ever-repeated question is 'how?'" Mayr contrasted this with the interests of the evolutionary biologist, whose "basic question is 'why?'...To find the causes for the existing characteristics, and particularly adaptations, of organisms."

A 'how' question can be satisfactorily answered at a proximate level: a 'why' question cannot. But, often, we treat 'why X?' as though it means, simply, 'provide a single plausible explanation for X'. Once we've done that, we stop. Worse, if an explanation seems self-evident, we don't even bother asking the question, for fear of looking daft. So queries are neglected because we think we know the answer – even though all we really know is one possible answer.

"We don't ask the question for fear of looking daft"

'Why do people go to the doctor?' 'Duh, because they're ill and want to get better.'

'Why do people hate standing on trains?' 'Duh, because it's uncomfortable.'

'Why do people give up smoking?' 'Duh, because it gives you cancer.'

I suspect all of those 'duh' answers are incomplete or largely wrong, but because they are plausible, obvious and make rational sense, we feel stupid asking corresponding questions.

Asking childish 'how' questions may indeed be silly. 'How are babies made?', for instance. Asking childish 'why' questions can be priceless.

Billions of pounds could be spent on improving NHS services, or on reducing railway overcrowding, without anyone seeking ultimate explanations for why people make GP appointments, or grumble about standing on trains. Yet, depending on what the ultimate – rather than the proximate – answer to these questions might be, the solutions to these problems could be very different.

For instance, I was fascinated to discover the success of a scheme to discourage unnecessary use of antibiotics. It seems that when patients suffering from viral illnesses are given post-dated prescriptions for antibiotics, they almost never use them – yet they go away from the doctor perfectly happy. By contrast, people refused antibiotics on the perfectly good grounds that they don't work against viral infections feel cheated. This is the kind of placebo solution that will never emerge if you assume people are going to the doctor 'to get better - duh!'

It is equally possible that, if we only knew the real 'why' of train overcrowding, we could design train interiors so passengers on shorter journeys stand voluntarily. Perhaps it is a simple question of balance – people seem perfectly happy to use those bum-rests on tube carriages, for instance.

American journalist H L Mencken once said that, for every complex problem, there is a solution that is clear, simple and wrong. These lazy assumptions are far more costly to society than mistakes. Mistakes tend to be corrected – assumptions survive, unquestioned, for years. ▮

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Global briefing

News, views and insights from around the world – from open banking in the UK to anxiety around motherhood in South Korea. Edited by **Katie McQuater**

UK – p14

Open banking has launched in Europe, but an Ipsos study has found that British consumers may not be ready for the idea. Ben Bold looks at what the eponymous non-profit organisation, set up to handle open banking, is doing to tackle misconceptions.

Iceland – p16

The Youth in Iceland research programme has been running for two decades, effectively intervening in youth substance abuse and informing policy. Now, the study is working to identify and understand new trends and risk factors for adolescents.

South Korea – p10

Despite some intervention from the government, birth rates are declining rapidly in South Korea, and a study by The Leading Edge has found women are anxious and concerned when they do choose to start a family, writes Katie Mitchell.

Ghana – p12

Lack of awareness and citizen participation in government development projects in Ghana has led to the launch of TransGov, a web and mobile platform aimed at improving transparency and accountability.

Indonesia – p18

Individualism is rising across the world as people seek new ways to express themselves. Kelly McKnight of Join the Dots outlines the results of the agency's research in Indonesia, which explores the impact individualism is having on a traditionally collectivist and conservative culture.

SOUTH KOREA

Motherhood in South Korea

The decline of birth rates is changing the face of motherhood globally, but this cultural shift is most prevalent in South Korea. **Katie Mitchell**, consultant at The Leading Edge, discusses the findings of a recent study

Birth rates are dropping rapidly in South Korea – according to Statistics Korea it has the lowest in the world. This is blamed on a tricky economy where two incomes are needed to keep a family afloat, alongside a competitive job market and, unsurprisingly, the evolving role of women in the home and in the workplace.

The government is pumping money into trying to tackle this problem by reforming maternity and paternity leave, but it has not had much impact. More than £50bn has been invested in initiatives such as subsidising IVF, and offering financial support for childcare, but again, with little effect. Birth rates are very low at 8.3% (average number of births per 1,000 population per year) compared with a global average of 19% (CIA World Factbook).

South Korea started in a similar place to most of the world; women there were expected to stop working when they got married and devote their time and energy to their husband and his family. And, like most countries, this attitude has changed dramatically and now women of all ages make up 42% of the workforce (OECD) – a significant proportion.

In South Korea having a dual household income has become an absolute necessity. Risking career advancement by taking time out to have a child is unthinkable to couples wanting to keep their high-status jobs, nice homes and financial cushion.

This is not unique to South Korea; families in many countries feel the pressure to maintain two incomes – but the 'difference' is the support for women in the home.

In comparison with other countries, the South Korean woman's role in the home has been slow to change. It's still relatively taboo for men to be too hands-on with childcare, and there is a shortage of options for young mums, often leading them to decide not to return to work.

Long hours

Women find themselves in a lose-lose situation where they need to work, but are also expected to do the majority of the childcare.

The long office hours in South Korea cause an additional burden, as fathers do not leave the office until late at night, leaving mothers on their own without much respite or support.

The government has encouraged employers to have 'family days' and send the workforce home early to spend time together – cue oyster dinners and Barry White mood music.

Universities have even started offering love, dating and marriage courses – which include having to date a fellow student for three months.

But again, nothing has been impactful enough to change the ongoing trend of reluctance to start a family.

Hard choice

Ultimately, the decision to start a family leaves women with a stark reality. Maybe you will be lucky enough not to lose your job on requesting maternity leave, and you can return to work and secure two incomes for your family. But, you will continue to work excessively long hours – around 15% higher than the global average, according to the OECD – and never see your children. Or you stay at home, alone, as your partner is likely to be working at least 12-hour days and weekends, and raise your family with minimal support.

So, how does this leave women feeling? We found they are incredibly anxious, concerned and worried when they choose to start a family, and often feel isolated. In our study of South Korean women aged between 18 and 45 trying to fall pregnant, a third felt more negative emotions than positive – a fifth higher than the other markets we studied.

At this point in a woman's life, there is a pressure to continue firing on all cylinders. Globally, we found that pregnant women, and those trying to fall pregnant, are generally more focused on maintaining a healthy lifestyle and keeping up with their 'usual' healthy routines.

In South Korea, this is of even greater importance. For example, managing stress levels is a primary concern for 40% of mothers-to-be and new mothers in South Korea, compared with 30% globally.

Getting a decent amount of sleep is a concern for more women, at 12% higher than the global average, as is not getting ill or having to slow down because of colds or flu – at 5% higher than other markets.

South Korean women are not as open when discussing their choice to start a family. Compared with other Asian markets, mothers-to-be are much more likely to look online for advice and support, which suggests there's some sort of taboo around face-to-face communications. Around the world, close family members are usually the number one source of advice but, in South Korea, online blogs, forums and social media are the primary sources of information about pregnancy and becoming a mother for one out of two women – compared with just one in five globally.

Negative emotions

When babies arrive, 28% of mothers in South Korea feel more negative emotions, such as worry and stress, than positive, compared with a global average of 11% in the markets we've studied.

While this is quite a crude way to look at emotions, the study highlights that this is a much more anxious time for expectant and new mothers in South Korea than in other markets, both in Asia and globally.

New mums are also under pressure to get back to 'normal' life quickly. Because of the lack of support, we found that their priorities for their baby's development are often tied with making the process of managing a small child easier – so that the mother can get back to 'normal' life. For example, setting sleep patterns and developing good behaviour are a key focus for a third of new mums in South Korea compared with an average of less than a quarter of mothers globally.

Support to guard against post-partum depression is of particular interest in South Korea, where 36% of new mums expressed an interest in products and services that reduce the risk of post-partum depression, compared with a global average of 28%.

It's clear there needs to be a cultural catch-up before things change. The government needs more than seemingly superficial 'quick fixes' so people feel truly comfortable starting a family – or even starting to look forward to planning for children.

As *Impact* went to print, the South Korean government passed a bill reducing the working week from 68 to 52 hours.

GHANA

Accounting for change

In Ghana, public apathy meant citizens were not participating in government-development projects that affected them. A technology project, supported by Making All Voices Count, helped people monitor local government schemes and share their input.
By **Katie McQuater**

Ghana's local governments were established to give people a voice to influence development policies and programmes in their area – but a low level of participation by the public meant their voices were not being heard and policy-makers were less accountable.

To tackle this, TransGov Ghana, a web and mobile application aggregating development projects for public monitoring, launched an initiative to help people keep track of – and offer feedback on – projects in their local area.

"The aim was to give opportunities for Ghanaian citizens to influence public policies and programmes, and maintain general oversight of development projects to ensure accountability, value for money and greater impact on their lives and wellbeing," explains Jerry Akanyi-King, chief executive and co-founder of TransGov.

"We believe that this is a critical requirement for sustaining democratic governance and promoting fundamental human rights in Ghana."

After meeting at the Meltwater Entrepreneurial School of Technology in Accra, TransGov's founders developed a web platform, an SMS system and interactive voice response (IVR) technology to give citizens the chance to share their input on government projects.

The platforms also provided information in the other direction – allowing government to share updates with the public, promoting transparency.

Awareness was promoted through social media, blogs and traditional media advertising. In addition, monthly meetings were held to allow conversations between community leaders and residents, and to introduce the project.

In total, the initiative monitored 30 projects, covering schools, roads, toilet facilities and bridges. Examples include the Korle Gonno Cluster of Schools – one of 14 school schemes undertaken by the Accra Metropolitan Assembly (AMA) in collaboration with the United States Agency for International Development (USAID) – and Kwame Nkrumah Circle Interchange, a busy intersection in Accra's arterial road network.

The website and use of SMS proved to be effective channels for citizens to submit feedback and monitor developments; in the case of SMS, people without smartphones could sign up for notifications on the developments they were interested in receiving updates, and could also send in their comments and suggestions.

ABOVE Kwame Nkrumah interchange and Korle Gonno Cluster of Schools

From its interactions with users, the TransGov team noticed that people were hesitant to download the mobile app developed for the project, because they believed it would incur a cost. Even when assured that the app was free, people still felt they were paying for the service, because – in their minds – they calculated how much data they would need to buy to download it. "This was a challenge in the beginning," says Akanyi-King, "but we later found a core, passionate group of users, who were tech-savvy and who gave us a lot of useful feedback."

The use of IVR technology proved to be very successful, reaching more than 7,000 members of the public. TransGov obtained a database of names and contacts from the local assemblies, and registered people for updates at the community engagement events.

The public submitted 780 comments in the form of feedback, but only one project made use of this – an abandoned school plan, which has since been reactivated and is now being built.

According to Akanyi-King, TransGov is working to become the preferred technology platform for the government to monitor its projects in an open and transparent way.

Citizens can now use the mobile app and SMS to flag issues and problems in their community, such as potholes and burst pipes. TransGov is working with the AMA to share this information, with reports automatically forwarded to the assembly through a dashboard on the platform.

"For transparency tech in Ghana to work, the shifting priorities of government and its officials must be planned for carefully," says Akanyi-King.

"A case in point is how government officials respond to citizens' queries in the 16 months leading up to an election. They are apprehensive of sharing project information – however, issues raised are usually resolved quickly.

"The key to success in dealing with government officials and utilities at the grassroots level is to have strong, higher-level backing."

HEARING ALL VOICES

Making All Voices Count was a programme to develop innovative approaches to fostering accountable, responsive governance, many involving tools based on mobile and digital technologies.

The programme – implemented by Hivos, the Institute of Development Studies and Ushahidi – built a base of evidence on the technology that encourages transparency and accountability and listens to citizens' voices.

From June 2013 until the programme's close, in November 2017, Making All Voices Count issued 178 grants to innovation, research, technology and scaling projects across 12 countries.

"We backed all these innovations, all these ideas, with the research to understand what is happening in the cycle of engagement from voice to responsiveness and accountability," says Dr Fletcher Tembo, director of the programme. "In each country, we did qualitative economy analysis [to form] a general understanding of how society and state interact."

A key consideration of Making All Voices Count was to build evidence about the use of technology as a means to achieving responsive, democratic governance. While technology can be an effective tool for engaging citizens, says Fletcher, it is not always the most inclusive solution, because not everyone has access to it.

"Technology is moving so fast, and the euphoria associated with it can make us assume everyone is there, but it can leave so many people behind," he adds. "We need nuance in exactly who is engaging, who is not engaging, and the innovative ways we could ensure people are included on their terms, around their livelihood. Then we create this movement of people who are taking part in technology, who are empowered, and who have a voice."

Making All Voices Count was awarded the President's Medal at the MRS Awards 2017. Its website is an archive of more than 60 published papers, plus practice papers, on supporting innovation in the field of accountable, responsive governance. Visit **www.makingallvoicescount.org**

UK

Open banking began across Europe in January, but awareness is low among British consumers. Ipsos Mori conducted a study to shed light on open banking perceptions and identify people's primary concerns. **Ben Bold reports**

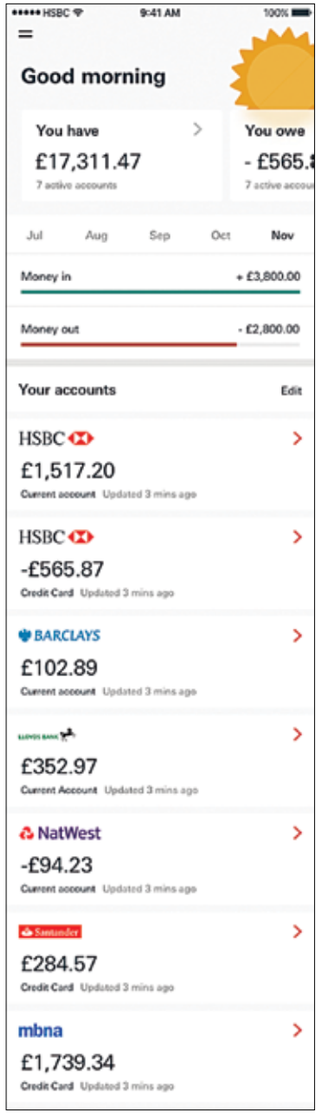
Open for business?

Banks and openness have not, historically, made good bedfellows. Whether it's the notion of a bank vault securely containing a person's life savings, or some of the opaque practices of banks – such as charging customers exorbitant unauthorised-overdraft fees that would cause a payday lender to blush – 'closed' is surely a better descriptor.

However, new EU legislation, PSD2, and a demand by the Competition and Markets Authority (CMA) that banks, with the permission of their customers, share customer data with other parties, has led to the birth of a new concept and an eponymous non-profit organisation – Open Banking.

The body's remit is to encourage innovation and produce data-sharing technology (called APIs), transparency and competition. Or, in the words of its head of propositions, Miles Cheetham: "To create a much more level playing field between financial services companies and big brands, and break the stranglehold the nine largest banks have on the market."

Launched on 13 January, 'open banking' is now open to business, with a few tentative moves by various players. HSBC is trialling an app, HSBC Beta, that aggregates cross-account data, while ING has launched its Yolt money platform, allowing consumers to view all their bank and credit card balances in one view.



But there's a challenge ahead – a lot of people have not heard of open banking. According to *Which?* research published in November 2017, 92% of people had not heard of the concept. A more recent survey, published in February by Yolt, showed an improvement, with only 39% having no idea what it is.

Last November, Ipsos Mori delved deeper into consumer attitudes in its *Open Banking Global Study*, which examined the views of 14,852 adult account holders across 15 countries. It quizzed them about four use cases – a smart comparison tool; an all-in-one financial app; speeding up of the application process; and direct payments.

"A couple of things stood out in the study," says Paul Stamper, Ipsos's head of financial services. "First, the consumer finds it hard to imagine what they have not seen yet and, second, open banking, as a concept, is not really what it's all about – it's about the things people will develop."

The study unearthed less encouraging signs, however, such as that only 21% of UK consumers would be motivated to sign up to the four hypothetical use cases.

"I suppose it was a reinforcement of what we already knew," Stamper says. "The fact is, the group we call 'technical laggards' just didn't like the look of any of the things we were suggesting. However, I don't think I necessarily anticipated that it would be quite such a significant proportion of the market that really would have no interest at all."

While the laggards, unsurprisingly, expressed less of an appetite, early adopters were hungrier. Insights gleaned specifically on UK adults found that 11% of consumers were 'active adopters' and 17% 'measured evaluators'. More than three-fifths (68%) of the former and 40% of the latter would be motivated to sign up.

"Niche adoption and adoption among the savvy is very open," Stamper says. "At a mass-market level, it will probably be much slower than perhaps we were hoping for."

Open Banking's Cheetham welcomes the Ipsos research and, reassuringly, isn't shocked by its insights. "There were no surprises in there for me – but I've been close to it for 18 months or so," he says. "It follows a similar pattern for a degree of cautiousness across the population."

It's little wonder, then, that security was the number one worry among those that Ipsos interviewed – 68% of measured evaluators expressed concerns about how their data would be used and 89% of conservative traditionalists were worried that their personal information could be obtained by criminals.

"Of course, people are cautious," Stamper says. "But if you think about the number of people signed up to Facebook, or Tesco Clubcard, with them holding all that personal data, the reality is that people weigh security concerns against the benefits of the product."

The challenges faced by Open Banking itself are myriad, but Cheetham stresses that the onus for consumer education falls on the brands that launch services built on the infrastructure.

"We're working with the banks, fintechs, consumer advocacy groups and so on, identifying the key messages that people need to understand," he says. "We're doing a lot of work around language and the way to present messages. It's very much a rolling launch. We are a cutting-edge technology and it's the first time it's been introduced anywhere in the world. Expect to see it relatively quiet over the next year or so, picking up in a couple of years' time – in five years, we're expecting a huge amount of activity."

He and Stamper draw an analogy between open banking and the slow take-up of contactless payments. "People were wary about contactless," Cheetham recalls, citing reports at the time of people wrapping themselves in tinfoil to protect themselves from inadvertent transactions as they passed payment scanners.

"Once you start to introduce viable use cases – Transport for London and Oyster being the primary one – it was a huge spurt for contactless," he adds.

In the meantime, Ipsos will continue to monitor consumer attitudes to open banking. "A lot of other industries – such as energy – are watching financial services and asking: 'What do the APIs mean for us?'," Stamper says.

Even when considering the level of consumer reticence unveiled in the Ipsos study, the market potential for open-banking players is huge; Ipsos's active adopters and measured evaluators equate to around 12.5m UK consumers.

"A lot depends on what the industry does, but I would have thought that, by the end of the year, we're going to find there are a dozen to 15 – [open banking brands], and that there's beginning to be a buzz, not about open banking, but about some of the things that it allows you to do," Stamper says.

"Assuming that the developers are on their game and that the apps, solutions and services are out there, there are clearly consumers who are ready to adopt them. It's not a case of 'if', but 'when'."

Cheetham agrees: "One day, people will realise that the way they interact with banks has fundamentally changed, with better service, and insight into – and more control of – their personal finances."

ICELAND

Established 20 years ago to tackle adolescent substance misuse, the Youth in Iceland research programme is today identifying new challenges for policy-makers and has become a blueprint for intervention initiatives across the world. By **Katie McQuater**

Seeing problems ahead

Youth in Iceland, the ongoing longitudinal research project surveying secondary school students, is credited with reducing cigarette smoking, drinking and cannabis use among the country's young people since 1997.

Though some of its content has developed over the years, the priorities have remained broadly the same: to advance and distribute knowledge on the social factors determining the health, wellbeing and behaviour of young people; to enhance the quality of life of young people; and to create a venue for collaboration of scholars, specifically for the education and training of young scholars.

As well as functioning as continuous monitoring tools to help local communities direct their work on young people's positive development, the surveys are also shining a light on the new risk and protective factors that have emerged over time.

The latest survey, for instance, found that the use of e-cigarettes in Iceland has been rising steeply, although there has not been a reversal in tobacco use, which remains low. The 2017 data showed 'current' use (within the past 30 days) of e-cigarettes to be at 15% – and use of combustible cigarettes at 4% – among 10th graders (15- to 16-year-olds).

The data has shown that adolescents who initiate e-cigarette use are more likely to initiate the use of alcohol and other types of drugs than those who do not smoke.

Álfgeir Kristjánsson, assistant professor at West Virginia University's School of Public Health, and a collaborator on the Icelandic prevention approach and Youth in Iceland study series, says this has implications for primary prevention. "There is something that is appealing about smoking e-cigarettes. Kids are seeing it as 'fake smoking' but it looks the same as real smoking; it has the same behaviours attached. The same drag of air into the lungs – it looks daring and risky.

"That is really the issue we need to tackle from a primary prevention point of view. Studies from other countries have shown that use of e-cigarettes leads to combustible tobacco, so – although e-cigarettes are less harmful than tobacco – they lead into it."

The study also found that levels of anxiety are on the rise among teenagers, particularly girls. Although there are indications that this trend is fuelled by screen use and social media, Kristjánsson says: "I cannot confirm it, but our primary hypothesis is that the social system of peer groups has shifted quite a bit – social media is in their face all the time." The researchers are working towards a longitudinal analysis of the relationship between screen use and anxiety.

The primary prevention approach of Youth in Iceland – an upstream idea of preventing problems from being initiated or developing into an addiction – differs from a 'therapy approach' of waiting for problems to become severe enough for clinical interventions.

To this end, achieving the programme's aim of long-term change means the model is reliant on collaboration between its various entities.

"The collaboration has to be between the boots on the ground – the researchers, the municipalities and the policy-makers," says Kristjánsson. "We're looking at a paradigm shift in the population and that's something you can't rely on a band-aid method for – they have been shown, time and again, not to work for preventative methods."

Once data is produced, it is shared with the various stakeholders – the "layers of the cake". Municipality leaders receive a report for their area to help them diagnose and track their position against other areas and nationally. It can also be used as a tool for determining how resources are deployed. Additionally, a copy is sent to each member of parliament. The most important layer, however, is that of local communities, says Kristjánsson.

One of the researchers' biggest challenges is making sure data matches the local communities and that they can see how they compare. "It is very common to get generalised reports/samples – this is not helpful at a local level," he says.

The model offers a set of recommended interventions, but it is up to communities to decide what they do with the data – a process that is most effective when there is strong collaboration involving parent organisations at a grassroots level. The idea of researchers coming into a town and telling local communities what to do based on the results, for instance, is ineffective, says Kristjánsson.

The survey's planning processes are centred on the researchers' goals of high-quality data and high response rates. Though technology has evolved since the studies began, they have found that the best approach is still good old-fashioned pencil and paper.

"While computerised surveys may often be easier to come by for the research team [no shipment of paper, data processing directly into computerised format, and so on], the schools that assist us in collecting the data are best geared towards the organisation and distribution of paper and pencil surveys," says Kristjánsson.

This is because almost none of the schools have computer laboratories that are large enough to accommodate all the students taking the survey at the same time, so coordination of students becomes difficult for the schools. The use of computer-based surveys also increases the risk of sample biases and means the researchers are, in effect, outsourcing data quality to the schools.

Key to the continued success of the model is the trust between local communities and the researchers, says Kristjánsson. "Often, people who have ties to the battleground feed us information about trends that might not have shown up for two years in the survey. This bottom-up collaboration has created dialogue and trust, but also an understanding that these entities don't work on their own."

INDONESIA

Caught between individualism and family expectation, self-expression is a strategic balancing act for young people in Indonesia, a new study from Join the Dots has found. By **Kelly McKnight**

Customising traditions

Across the world we are seeing a rise in individualism. This might feel like a recent phenomenon, driven by millennials, the ultimate 'me generation', yet individualism has been increasing for several generations. Recent figures put growth in individualistic practices at around 12% since 1960 (Santos and Grossman, 2017).

As international market researchers, we recognise greater individualism is impacting different markets. We carried out research in Indonesia to explore how it was affecting this traditionally collectivist and conservative culture, combining quantitative research with cultural contextualisation to unearth new insights.

Collectivist culture

Indonesia is a strongly religious society, with a Muslim majority and inherent conservatism. Affiliation and togetherness are important, expressed in the shared values of *gotong royong* (mutual cooperation) and *bhinekka tunggal ika* (unity in diversity).

Our quantitative survey of 1,000 Indonesians identified that individualistic beliefs at a societal level, such as freedom to express one's opinions and to choose one's path in life, are shared by all ages, but when it comes to choosing brands, products and services, a very different picture emerges across the generations.

Enabling self-expression via consumption choices was found to be important to 42% of Indonesian Generation Z (17- to 21-year-olds), compared with only 26% of Indonesian millennials. In contrast, choosing brands that have a positive social impact is important to 37% of Gen Z versus 58% of millennials. The survey data supports the view that Indonesians are becoming increasingly individualistic, with Gen Z leading the charge. But it doesn't help us understand what this means to young Indonesians and the impact of the generational differences.

To explore this cultural context, we enlisted the help of our 'Illume Guides' – culturally savvy consumers in local markets around the world. They represent a wide range of personal passions and are among the first to adopt the latest trends.

Balancing identities

Whether it's getting a tattoo or listening to punk music, experimentation by the younger generations is causing tensions between those keen to embrace liberalism, and those intent on preserving the accepted Indonesian society. Torn between their own progressive ideals and the expectation of family and communities, young people are exploring self-expression in a considered, measured manner.

Key to this strategic balancing act is social media. Different platforms satisfy different needs, allowing Indonesians to fulfil multiple social roles (family, religion, work or study) while continually spinning several identity plates at once.

Facebook is the place to keep in touch with parents and older relations, and so posts and content should be 'clean' and present you in a positive light. Conversely, Instagram is used to express more intimate thoughts and feelings with close friends who have similar views, without fear of judgement. On YouTube, Gen Z share satirical videos from vloggers such as Cameo Project and Skinnyindonesian24, who encourage thought on topics ranging from gender stereotypes to political elections.

Express yourself

Independence and self-expression come from the ability to choose what's valuable to you. In Indonesia, self-expression is also about having the bravery to challenge outdated opinions, while still showing respect for others to maintain good relationships. This means self-expression is subtler, as there needs to be a balance between having individual opinions without disrupting your wider networks.

One way young Indonesians are expressing themselves is through customising and personalising existing traditions. This doesn't mean they are running away from traditional values or religious practices; rather they're choosing the way in which to celebrate them. An example of this is designer Ria Miranda, who produces culturally appropriate clothing with a modern twist. Her designs encourage religious Indonesians to embrace new colours and designs while still adhering to their religion.

The survey data might point to significant intergenerational shifts around individualism, but leading a peaceful life is the priority for Indonesians. With approval from the old just as important as discovery of the new, young people are seeking safe spaces in which to explore their own sense of self without disturbing the balance. ■

Kelly McKnight is head of culture and trends at Join the Dots

Innovation, inspiration and integration

…that was the order of the day – or two days – at the MRS's Impact 2018 conference in London in March. Reporting by **Jane Bainbridge, Ben Bold, Jo Bowman** and **Katie McQuater**

Space scientist and communicator Maggie Aderin-Pocock is motivated by understanding the vast gap in knowledge about space

"We only know what 6% of the universe is made of; the other 94%, we have no idea about – it's embarrassing. We build these huge telescopes and send things up into space. We come up with handy phrases such as 'it's dark matter', but we have no idea what dark matter is."

This is just one of the many issues that inspires and drives Maggie Aderin-Pocock, and one of the questions she raises with schoolchildren in her role as a science communicator, to highlight how much there is still to learn. She explains complex scientific information to pupils using relatable exercises, such as getting them to start counting to one billion (this would take 32 years) to help communicate the vastness of space.

Achieving broader understanding and enthusiasm for science is not an easy task. Asked for her view of Professor Stephen Hawking, following his death, she said: "He was so much a part of our lives. Not everyone can achieve that. My seven-year-old knew who he was because he had been on *The Simpsons*. He was a pioneer and we're following behind not quite getting it – but he was trying to communicate his knowledge as best as he could."

As a child, Aderin-Pocock aspired – "a pipe dream" – to go into space, but things, initially, didn't go to plan. Dyslexic, she found herself at the back of the classroom, worried she might not get to university. "I watched *Star Trek* and *The Clangers*, and I was dreaming about the stars; I was hearing about people like Neil Armstrong going into space and I wanted to join them."

The pivotal moment was in a science class when the teacher asked: "If a litre of water weighs 1kg, how much does one cubic centimetre of water weigh?" – and Aderin-Pocock put up her hand to answer. "Suddenly, I thought I'm not as dumb as I think and, more importantly, I'm not as dumb as other people think I am. So I say to kids: 'Put your hands up and see what happens'."

Making it to the top of a field dominated by white men, she is happy to be a role model for others, as long as people see her as a real person too.

"I'm pathologically late and chronically untidy. I thought I couldn't possibly be a role model, but I think I got that wrong; to be a role model, you shouldn't be perfect – you should show your flaws."

Human urge to help sends message of positivity

Dexter Dias QC, barrister and author of *The Ten Types of Human*, described how people display extraordinary resilience and self-sacrifice for the sake of those they will never meet because most have an innate "pro-social" drive that has offered an evolutionary advantage for millennia. He described a woman in the US who had received death threats for campaigning against female genital mutilation in sub-Saharan Africa – but she did it anyway, to spare girls living thousands of miles away from having to endure the cutting she and her sister had suffered.

He recalled the case of a jury weeping when a sex offender was convicted and his young victims, now grown up, won justice. And the case of a woman who had fought to get answers about the death of her son, Gareth, and who was then motivated to fight on for other people.

"Why did that jury weep? What is it in Gareth's case that made people want to fight back and do something to continue to seek justice. And why is it [the woman] is risking her life to protect people she will never see?"

Action for a greater good – or what Dias called "pro-social behaviour" – is a powerful impulse that drives 90-95% of people to varying extents; it gives them a feelgood buzz to do something for other people and has helped the human species adapt and survive.

"We have really strong pro-social urges," he said. "We hear lots of doom and gloom about the world, and how terrible we are. I take the opposite view. My experience is, yes, there are dangerous people and people who cause great harm, but there are also a majority who do not, and we tend to lose sight of that."

Dias urged the audience to rethink the Edmund Burke observation that "the only thing necessary for the triumph of evil is for good men to do nothing". "I try to ask a different question: imagine what we could accomplish when good people do good things and… imagine what we can accomplish when we do good things together."

He urged further collaboration between the legal community and people in market research, to achieve learnings for the greater good.

"Imagine putting all the insights you have gained about the human condition with those that we have had to learn the hard way, in the courts, to form a more complete view of what human beings are like. The possibilities are endless."

Reality is virtual

The Royal Shakespeare Company (RSC) and O2 have both trialled virtual reality consumer research and gained not just useful insights, but also confirmation that VR is a viable and enjoyable tool.

Becky Loftus, head of audience insight at the RSC, explained a project to understand how the audience experience of *Titus Andronicus* differed according to whether they watched it in a theatre, saw a cinema broadcast, or watched it on a VR headset. Participants' heart rates were tracked via a wrist device and they were interviewed afterwards.

Pippa Bailey, head of innovation at Ipsos Mori, which worked on the project, said 91% of the VR group felt there were moments when they were actually in the theatre, compared with 64% of the cinema group. People's enjoyment of the experience, and their willingness to wear a headset for a performance of more than three hours, signalled big possibilities.

"It showed the potential virtual reality has for use within research. Its uncanny ability to replicate real experiences, and respondents' tolerance for being in VR, opens up an entirely new world for us as researchers," said Dr Alastair Goode, cognitive scientist at Gorilla in the Room, which worked on both the RSC and O2 projects.

"With VR, we can get responses from any respondent in any situation."

O2 used VR to test different versions of a promotional stand in stores featuring its connected home products. Ian Bramley, director at Populus, which worked with O2, said the results were highly encouraging. The natural way that respondents could look around a store led to higher spontaneous recall of the O2 Home display than among a control group watching a linear video.

When asked, later, about their enjoyment of the VR experience, 88% said they would be interested in doing VR surveys in future and 75% said doing a survey in VR was more fun than another medium; 68% said they'd found it easy to use Google Cardboard headsets.

Jokes and journalism

Private Eye editor, author and broadcaster Ian Hislop said of the satirical magazine: "We do jokes and journalism, and a mix of the two. Tell them things they don't know and then make a joke about it."

Scandal, he said, no longer lay in sex, but in "the interface between commerce and politics" – and the rise of private finance initiatives (PFIs) has been particularly prevalent here. "The idea that you outsource everything is madness. It's grotesque – capitalism with its worst face on."

Trust is vital for *Private Eye*. "The reason we get stories right is because the story is told to us by people in the middle of them. It's about getting people to trust us and then running it." Plenty of politicians have come under the magazine's critical focus, but Hislop thinks modern politicians are more sensitive than those of old.

"People who have come into politics recently seem to be appalled that people disagree with them,' said Hislop. "You might not like the *Daily Mail*, but that doesn't mean you close it down – don't buy it, disagree with it."

When it comes to understanding his audience and readers, Hislop doesn't engage in research, opting for gut instinct. "We have no scientific basis. We do get a lot of feedback from the readers; it's a kind of club."

In a media landscape awash with digital-first strategies, Hislop is resolutely old school. "We still believe in print. We're not offering it digitally. We have a belief that journalists and cartooning work best in print and you should pay for them." Lambasting the idea that you can have quality content for free, he added. "It costs £2 an issue and we're employing 50 brilliant people."

Despite the apparent downward spiral of news, Hislop says he's basically optimistic. "A lot of it is cyclical. I'm interested in satire and history – I don't get too panicked when a story comes around again. People say Trump is the biggest liar in history – well, have you seen Mussolini?"

Scottish crime writer Val McDermid says the best research and insight into people's lives comes from answers to the questions you didn't know to ask

Interviewed by Martin Lee, Acacia Avenue's co-founder and strategist, Val McDermid talked about her childhood in Kirkcaldy, Fife, how a sole Agatha Christie novel – sitting alongside the Bible – at her grandparents' house sowed the seed of her crime-fiction career, and how a love of libraries allowed that seed to grow and flourish.

Born into a working-class family, McDermid became the first student from a Scottish state school to be admitted to St Hilda's College, Oxford. But this course of her life hinged on a deceit during her childhood. Aged nine, she had to fabricate her mother being ill, in order to take adult books out of the library. The ruse worked for years and fed McDermid's muse. That minor crime came back to bite her, however. When she attended an event at the library, her mother in tow, the librarians to whom she had lied were there. "Mrs McDermid," they said to her mother, "we thought you must be dead, being an invalid all those years."

McDermid's literary beginnings were in attempting to "write the great English novel". A failure, but one that was turned into a play and resulted in McDermid gaining an agent – and the accidental status of playwright at the age of 23. "The problem was, I didn't know how to replicate that success," she said. "After a few years of dismal failure, my agent fired me."

After working as a journalist, McDermid became a full-time fiction writer, with her first book, *Report for Murder*, the first Lindsay Gordon mystery, published in 1987. "Storytelling is investigating why people do what they do," she said. "How many times does a perpetrator get a sentence that doesn't reflect the gravity of what they've done? How does an investigator bridge that gap? Those are the ideas to explore."

McDermid talked a bit about how for her novel *The Last Temptation* she spent a lot of time on barges, talking to bargees and discovering "a lot of things you realise you don't know that you need to know". She added:"If you go to the library or use the internet for research, you get the answer to the question, but you don't get the answer to the question that you didn't ask."

Asked if she had any advice for data researchers, McDermid replied: "Know where to start your story. Where you should start your story is where you start one when telling your friends in the pub."

Time for marketing to get conscious

Advertisers and agencies are failing to represent minorities in communications – and even people who don't identify as being in a minority community don't feel that ads really reflect their lives. "Stereotyping is rife in the UK," said Michael Brown, insight director at UM. "But the discussion around equality is being energised."

UM research among 2,000 people across the country found that 68% of people want ads to reflect UK society, and 75% say market research has a role to play in helping everyone's voice be heard. "Everybody in this room has the possibility to have a stake and influence how this story unfolds," Brown said.

Ros King, director of marketing innovation and communications at Lloyds Banking Group, described the bank's push to reflect modern Britain – not just in its communications, but also among its staff. Research there helped understand how reflective advertising is of modern Britain, and whether representation improved people's perceptions of brands. King said that, among ads from the top 20 biggest-spending advertisers, only 19% included anyone from a minority, even though minorities included people aged over 65.

"British advertising is still disproportionately white, straight, youthful, and a world of two-parent families," King said. "Around two-thirds of people Lloyds surveyed said advertising should be more diverse, and 65% said they regarded diverse brands more warmly."

During a panel discussion on how best to effect the change that consumers clearly want, Karen Fraser, director at Credos, said a tipping point often came despite doubters within a business. "In some cases, you just have to believe that what you're doing is the right thing and press on. There are occasions when bloody-mindedness is good," she said.

Jan Gooding, president of the MRS and global inclusion director of Aviva, said true inclusivity was "incredibly difficult". "We're pursuing an inclusive culture that leads to diversity," she said. "We're not chasing tick boxes of different kinds of people. There's something in it for everybody."

Fear of a backlash against brands that promoted minorities in their advertising was more often a problem for agencies than for brands, the conference heard. Agencies wanted brands to lead and brands wanted agencies, pitching for work, to offer diverse teams to work on campaigns.

Diversity within businesses should be a precursor to inclusive communications, the panel said; a brand could not project an inclusive image with any credibility or authenticity if it didn't promote inclusivity within.

That, panellists said, meant not only recruiting differently, but also offering more support for people when they were hired. "A beautiful tropical fish put into a tank just gets eaten by the other fish," Gooding said.

Mark Runacus, president of PrideAM, said change started with research and promotion of the business benefits of inclusivity.

"There's plenty of evidence for you to take into your organisation to show there is a commercial imperative, and that consumers really identify better – and have a much stronger emotional connection – with a brand that has an inclusive and diverse approach."

TOP TIPS...

for data success, by Edwina Dunn, (pictured below) CEO of Starcount and co-founder of dunnhumby

1 Data is both art and science
Our industry should be making data a source for good. This isn't what happens now. We throw everything at everyone. Digital is free and it's gone back to the 50s' era of 'if you throw something, it will stick'.

2 Functional vs emotional engagement
Functional loyalty = the rear-view mirror; emotional loyalty = future intent. People love anything more than brands – football or saving the planet. If you can make a brand relevant to their interests, emotions or beliefs, it can become very powerful.

3 Embrace agility and adaptability
We've all heard the phrase 'data is the new oil' – so we have to think of the whole business ecosystem as the engine. Data doesn't drive businesses, because there are breakages all the way through the system.

4 Adopt a learning culture
It sounds easy, allowing a test to fail fast and moving on, taking an organisation that is risk averse to test things simultaneously. But if you don't do it, you won't keep up with disruptors. Create a culture of curiosity.

5 Buy in continuous education
Firms such as Amazon and Google know what people are searching for every minute of the day and we don't need so much research when we've got that open-source data coming. But we do need skill sets, not developed yet, to use data from our own and outside organisations.

6 Top-down buying
How many times do you come across a business where marketing is not onboard with data? If data sits under IT, someone needs to speak up about how to embed data in an organisation.

7 Stay goal orientated
A lack of knowledge about customers can lead to bombarding high-frequency consumers with offers and discounts. That's a race to the bottom and can lead to brand disaffection. Base your communications on genuine customer insight.

The disruption and opportunity of data science

Data science allows researchers to mine a rich seam of information, but its scale, complexity and fragmentation can be overwhelming, according to a panel of marketers and researchers.

Chaired by Corrine Moy, global director of marketing science at GfK UK, the panel comprised Owen Abbott, head of big data at the Office for National Statistics (ONS), Nick Rich, vice-president of global market and consumer insights at InterContinental Hotels, Andrew Geoghegan, Diageo's global head of consumer planning, and Claire Rainey, Sky's head of research change and continuous improvement.

Moy asked how companies were managing the plethora of data out there, from company-commissioned research to open-source information.

Abbott explained that the ONS was "in the middle of a journey" and that the rich vein of data from open sources could revolutionise aspects of its work. "We have a strategy called 'better stats, better decisions'," he said. "Part of that is looking at new and alternative sources of data. A good example is the 10-year census; we're looking at how we can integrate other sources of data into the census, to produce data outputs we've not produced before. We're also looking at whether we can replace the census with other integrated sources of data, saving the taxpayer lots of money and giving up-to-date data and regular stats. A bit of a criticism is that census data is always out of date."

However, Diageo's Geoghegan thought data science, and its disruptive potential, was "so hyped". "It's just another tool, like research and behavioural economics," he said. But he admitted that "for us, it's been really successful in applying data analysis to business problems such as marketing effectiveness".

Sky's Rainey agreed with Geoghegan's point about hype, and suggested a more sober approach. She pointed out that legacy data and the historical siloed make-up of businesses meant a lot of work was ahead. "Going back a few years, everyone started talking about big data and being on a data lake without any oars," she said. "Let's not try and integrate everything all at once, as it is growing exponentially – do it bit by bit, on an incremental basis."

Meanwhile, InterContinental Hotels' Rich highlighted the customer. "You work out where the customer is at the heart of this, and arrive at the conclusion that the data journey is the customer journey," he said. "Get out of the mindset that you must bring everything together and stick it in this warehouse."

While the array of data sets becoming available threw up challenges and opportunities, the panel agreed market researchers were crucial. "It still requires humans to join the dots between data sets, which tell you 'what' but don't tell you 'why'," Geoghegan said. Look for agencies that can work synergistically with all the data and research available, he added.

The right ingredients

Ambition, determination and resilience – entrepreneurs have a lot to learn from the traits embodied by the average two-year-old, according to Ella's Kitchen founder Paul Lindley. **By Katie McQuater**

Starting a business is, in some ways, akin to becoming a parent – sleepless nights, learning new tricks and, sometimes, simply trusting your instinct. For Paul Lindley, that gut feeling – based on his experience as a parent – was the belief that baby food could be different: healthy, convenient for parents, and fun for children.

It was the starting point for Ella's Kitchen, the range of puréed organic fruits and vegetables – named after Lindley's first child – that would go on to become the top-selling baby food brand in the UK. His daughter Ella is now 18, but the brand is celebrating its 12th birthday on the day of our conversation, having come a long way from its early days in Lindley's kitchen.

Though brands have more data at their fingertips now than when Ella's Kitchen was born, Lindley is still an advocate of following your nose. "Big data is vital, and algorithms tell truths, but gut feel still plays an important part," he says. "That human-ness of the business – being able to express itself not in a cold, calculating way, but in a human way – resonates. I think that's growing at the same time as the importance of big data and algorithms."

This can be a tricky balance to master for start-up founders, with an increasingly large array of insights and potential avenues for exploration – particularly if those insights challenge human intuition. Lindley believes, however, that good entrepreneurs don't ignore their instinct when they grow more established and gain insights from research and data; instead, they use these to support it. Consumer brands that can gain customer trust through both sides of the equation – "by quant and qual, if you like; by the data and the gut feel" – and that understand how people live and "the emotion of why they make purchasing decisions" will succeed, he says.

Before launching Ella's Kitchen, Lindley spent nine years at Nickelodeon, first as financial controller – moving to strategic communications and marketing – before becoming deputy managing director. He gave himself two years to get the brand to market, with the proviso that he would find a job if things didn't work out. "I thought 'I'll regret not trying this, even if it fails'," he says. "We didn't fail, but – along the way – we've learned from things that haven't gone right the first time."

Lindley spent most of the two years ahead of launching the brand planning and understanding, conducting what he terms "amateurish" ad hoc market research with no budget – mostly with friends and acquaintances – to gain insights on the needs of parents and test his ideas.

His vision for Ella's Kitchen as a playful sensory experience for infants went against the convention for baby food, notably through its use of pouch packaging, which had never been used in the category. "The professionals were saying 'You're trying to put baby food into pouches – you won't be able to see it. It's always been done in glass jars.' I'm thinking, 'as a parent, I find it really convenient, toddlers get excited about holding it, and our focus groups thought it was a good idea'."

Mixing fruit and vegetables was also unheard of at the time, and Lindley admits he was nervous about using recipes that paired "odd ingredients", such as sweet potatoes and blueberries. "I knew my baby and our test babies liked them, but would a random stranger shopping for their baby like them?"

When Ella's Kitchen launched in 2006, brands were still in broadcast mode, communicating a one-way stream of messages with little interaction with their audiences. Today, the rapid rate of technological change has shifted the balance of power, and it is consumers who determine what brands stand for and how they are perceived. "For good companies, there's two-way traffic," says Lindley.

> "Good entrepreneurs don't ignore their gut feel when they grow more established and gain insights from research and data; instead, they use these to support it"

This two-way communication between the brand and its audience is essential to making sure Ella's Kitchen is validating or questioning itself – and that's where market research and customer feedback come into play.

As the brand has grown, the ad hoc customer insight gathering of the early days has become a more established aspect of how the business is run. An online community of 300 core consumers, managed by market research agency C Space, collects feedback on new products, design, markets and consumer behaviours, and has generated around 61,000 ideas submitted by parents. "We've got to be constantly thinking – what does a family look like in 2018? How do they live? Where are the stress points?", Lindley says.

People and purpose

These days, Lindley is chairman of the business, and no longer as involved in its day-to-day running after its sale to US firm Hain Celestial in 2013 – a move that could have threatened the company's position as an organic brand with its own purpose.

When Lindley handed over responsibility to the management team and current chief executive Mark Cuddigan in 2014, he realised the culture and values the company had carved out over the years would be sustainable – in part because Hain understood the brand is successful not simply because of churning out new products.

Lindley believes the success of Ella's Kitchen is rooted in the company having a purpose beyond profits – and that is to improve children's relationship with food. Bound into this is the importance of people. The best businesses are not about simply making money, he says, but about understanding and investing

> "Capitalism needs to evolve hugely in the next five or 10 years, otherwise there's going to be some sort of revolution. There are too many people not winning from it"

in individuals. Internally, that means motivating staff to understand the company's wider mission and their role within that. Externally, it's about building trust with the consumers whose lives you are trying to touch.

"You need the trust of the people who are willing to buy your food for the most precious person in their lives; trust that it will deliver not only what's inside the packaging but also buy into that trust of why you exist – that it's not a faceless corporation, and it's not just making money to go into shareholders' pockets."

The company became B Corp certified in 2016, which means it meets rigorous standards relating to social responsibility and financial transparency. One of the stipulations for certification is changing the company's articles of association to value the interests of all stakeholders and maximise benefits to society as well as shareholders.

Ella's Kitchen has already had its first job applicants who want to work there because of its B Corp status – something Lindley attributes to the changing priorities of younger generations. As these people become employees and entrepreneurs, he believes the whole nature of business will undergo a seismic shift.

"Whether they are future employees of businesses such as ours, or consumers of our products, they expect the values in a company they work for, or buy from, to overlap with their personal values. If enough consumers are making those decisions over baby food, before long they'll be making those decisions about pensions."

This, believes Lindley, will lead to inexorable change in how business is conducted. Far from companies attaching themselves to a modish 'brand purpose', the B Corp model is about redefining success in business – and that means redressing its short-termism. By focusing on maximising profits for shareholders on a quarterly basis, business leaders are failing to invest in long-term growth that has a wider positive impact on society.

"It's not about maximising profits this quarter," says Lindley. "It's about making profits over a long time, having an idea of what you're going to do with those profits, and motivating people to work for you and buy from you under that mission. Minimise the bad you do, maximise the good that you do, and build a sustainable business."

The most successful companies of the future will be those that recognise this, he adds. "Capitalism needs to evolve hugely in this next generation – in the next five or 10 years – otherwise there's going to be some sort of revolution. There are too many people not winning from it and not trusting it. From 2010 to now, the UK economy has grown by 12% GDP [gross domestic product], yet average wages have fallen by 6% – so there's an 18% gap.

"Where is that money? It's in the balance sheets of big companies that aren't doing anything with it because there's an uncertain macro system in our world. It's just sitting there and that's not doing anything for the economy or for people's daily family lives – and the most successful businesses will realise that."

In Lindley's view, businesses should be offered tax breaks for consumer excellence, to incentivise them to invest in research, knowledge and improving systems to better understand consumers. Essentially, this would allow them to spend money on things that don't have an immediate return, but that equip businesses for the future, such as improving customer care.

The interplay of social responsibility and business has influenced much of Lindley's non-executive activity outside of Ella's Kitchen. He is currently on the board of trustees at Sesame Workshop, the non-profit organisation behind *Sesame Street*, and is part of the board of advisers for craft beer Toast Ale, a start-up that brews beer from surplus bread. He's also involved with the Robert F Kennedy Human Rights organisation. All are centred around the idea of business – both individual corporations and the wider ecosystem – heading towards inevitable transformation, Lindley says. "Our economy should serve our society – we should create prosperity, but have an idea of what to do with it."

What would a two-year-old do?

The current Brexit-related uncertainty, however, risks pushing innovation down the list of priorities for British businesses. In a society in which our education system, parenting styles and business teach us to conform, how can individuals at the heart of businesses think differently?

The answer, according to Lindley, is to think the way a toddler would – and this premise is the subject of a book he's written on adjusting our mindset. By rediscovering old behaviours and being playful – "growing down", as Lindley terms it – people can unlock greater potential for new ideas and solutions to society's problems.

"There's no more resilient, ambitious, determined person than the person you once were when you learned to walk," he explains. "None of us learned to walk when we decided we wanted to; it took 500 times, yet we all did it – we all had that high ambition."

Bringing in solutions that were tried and that failed in the past will fail again – but, Lindley says, corporations paying bonuses based on short-term financial gain are short-sighted, because they don't incentivise experimentation. "If it fails this year, they're not going to get their bonus. If it fails and it only needs to be tweaked to succeed for next year, they don't have the incentive to do it next year."

Another challenge in today's entrepreneurs, he observes, is that some have been conditioned to expect instantaneous

gratification. "Building a business takes time; building a brand takes time; building trust with everybody you work with takes time – so the mindset of the entrepreneur has to be longer term than perhaps many of the things in this generation are pushing them to do."

It's a lesson Lindley knows all too well: while he took his time to build Ella's Kitchen and understand the needs of its target market inside out, it wasn't quite the same story for Paddy's Bathroom, the natural toiletries brand he created two years ago, named after his son, Patrick. The business is now closed, because it could not find a way to make profits sustainably – partly because of launching too quickly, he says.

The brand was offered the opportunity to launch with an American retailer before going to market in the UK, and Lindley admits the challenges of this were underestimated. Part of the issue, he concedes, was assuming American and British consumers were the same.

Lindley also thought that the consumers who were buying Ella's Kitchen products would also want to buy a Paddy's Bathroom product. In reality, he says, "some of the things they cared about with their food, they cared less about with their toiletries and personal care products."

"If you're an entrepreneur, focus on how you can adapt to the different (Brexit) scenarios that will come through... work out why you've got a point of difference"

Though the company improved the product after a study by MMR – which recommended a sensory branding approach – Lindley admits the research came 18 months too late. "We should have waited; the mistake was to rush into an opportunity to go to market, even though I had 10 years of experience of Ella's."

He's optimistic, however, about the future of British businesses, despite the current economic climate – which, he says, offers opportunities for those brave enough to take risks. "Good things have come out of recession and it's those small companies that are going to be willing to find the opportunity and take a risk, and reap the rewards from that in uncertain times.

"There's nothing we can do as individuals [about Brexit] – we've had our vote. If you're an entrepreneur, get your head down and focus on how you can adapt to the different scenarios that will come through. How Brexit, the currency market and regulation are going to land – you can't really do all of those things day to day. But work out why you've got a point of difference, how you can best adapt and sustain that, and just go – because the bigger companies are not doing that. They're not investing, so there is an opportunity."

For Lindley, reflecting on 12 years of the brand he built – as the Ella's team gather in the next room for their anniversary lunch – it all comes back to the people. He still finds it "indescribable" that something that once existed only inside his head is now a big part of people's lives.

"It's humbling to sit on a train and hear someone behind you talking to their friend about your product and how it's changed their lives." And he's proud of the people who have made that happen.

"It's been successful because of ideas people have when they walk their dog, as much as when we sit down and say 'right, here's a meeting about our next product – what is it?' I'm proud we have managed to motivate and reward people who have worked on this for 12 years."

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Brands looking for deeper understanding of their customers' attitudes want continuous tracking and a regular pulse check – and thanks to technology and modified research techniques, this is increasingly possible. By **Tim Phillips**

Keeping a constant customer dialogue

"We are at the point now that insight can be fast, cheap and good. It's no longer the case that we can have only two of the three," says Yvonne O'Brien, until 2017 the chief data and insight officer for Havas Media Group.

Excited by the potential of the applications that can create real-time, continuous customer dialogue, O'Brien has decided to work with the innovators who are creating them. "Insight needs to evolve faster, and look at new data sources. These can come from social, from CRM, but – at the moment – there is a degree of methodological purity that holds the research industry back," she warns. "Some of the new entrants are much more nimble, and what they are doing is easier for clients to understand."

Innovative self-service, tech-driven research methods such as webcam interviewer Voxpopme or online research tool ZappiStore have quickly moved to the mainstream, but both are less than five years old. When ZappiStore launched in 2013, CEO Stephen Phillips joked that he could become "the most hated man in research". Instead, the company now serves clients and agencies in 36 countries, and works with many of the more established research companies.

This has mainly been driven by a shift in the centre of gravity of insight. For many clients, this means finding out something about now, that they can act on today. CRM, social data and the insights of operational data have shown that near real-time response is possible.

Agile marketing and micro-targeting mean there are more parts of the client organisation that need rapid, integrated sources of customer data. The increasing influence of job roles such as chief customer officer is also driving organisational reform for ambitious clients. "A lot of this is about connectivity between sources of data," O'Brien says. "This is really interesting and challenging work... and insight companies don't want to be given a brief to fulfil; you should want to be at the table deciding what the brief is."

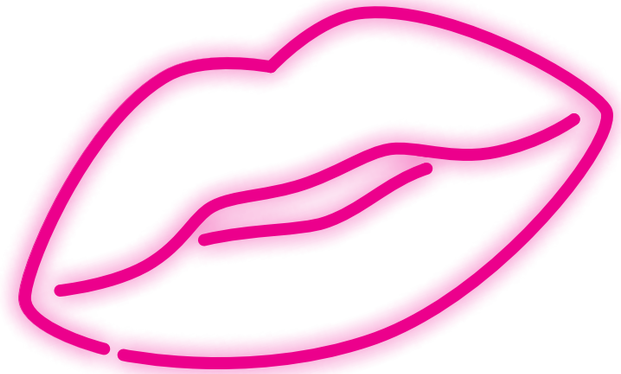
The growth in demand for this type of continuous insight has been sudden and rapid, and fuelled by changes in client needs, as well as the availability of technology. Paul Twite, managing director for Europe and MENA, for ITWP and Toluna, dates the change in client expectations to around 2016 – at which point interest in the digital platform that Toluna was offering suddenly increased.

Big brands have embraced the need to move at speed, Twite argues, but demand for Toluna's QuickSurvey and QuickCommunity tools has also been driven by a democratisation of the use of online, self-service research tools across an organisation. For example, Procter & Gamble's brand managers and R&D teams recently started recommending Toluna's platform to each other, because they all wanted 24-hour feedback on their initiatives to iterate quickly or spot faults.

"Sometimes we're dealing with different bits of the organisation," says Twite. "It could be brand owners, who used to have to go to internal research teams and ask a question, then wait for research to validate the answers, to mitigate risk. Now they are saying if they get customer feedback in real time, from any source – it could be social media, a platform, research, or a customer community – they would be better off. Most customers are happy to have 85% of the information on time, rather than waiting for 100%. The idea of 'fast fail' has become commonplace and helps to propel businesses forward."

> "The idea of 'fast fail' has become commonplace and helps to propel businesses forward"

In Twite's experience, however, it has taken longer to convince the research industry to embrace these tools. He recalls that when his CEO, Frédéric-Charles Petit, first started evangelising about the real-time analysis tools Toluna was providing, it was tough to convince customers ▸



in the research business – who make up about half of Toluna's revenues – to consider them.

Twite recalls: "He [Petit] said, 'I can create automated tools so, in an hour, you could have 1,000 responses and the data could be analysed in real time'. But customers said, 'that's nice, but we'll have it the old way, thank you. That's really interesting, but actually we'll just go back to doing our own fieldwork'."

Bolder, faster, more creative

Clients are now putting pressure on established agencies to change what they offer. When Caroline Frankum joined Lightspeed as global CEO in April 2017, her remit was to adapt the company to the changing expectations of its clients – partly because it identified that more client insight budgets were no longer protected. The company launched a three-year transformation plan in June 2017.

"We have been a very successful panel company for 20 years, but we need to be much bolder, much faster and much more creative in how we connect consumers and citizens with clients," Frankum says. "There are people, like management consultancy firms, that are also starting to eat our lunch,

> "Growth in demand for continuous insight has been sudden and rapid, and fuelled by changes in client needs"

particularly in the digital space. Deloitte's digital transformation business is the smallest part of its offer, but it is the fastest growing."

But what will Lightspeed do? Frankum argues that it must make much more use of technology. An early example is the LifePoints mobile app, launched in the US in 2017 and now globally, which combines surveys, gamification, engagement, polls and a community, as well as passively collecting information through geo-sensing for users who opt in.

"Instead of saying, 'we want you to fill in a survey, when it suits us, about a retrospective brand experience that we want to talk about', we're saying, 'earn points to live your life; if you let us collect information about you, we will reward you for that'," says Frankum.

"Brand tracking – because it was the most complicated research and the most time-consuming – was always the most expensive. Our brand-tracking clients like LifePoints because it means they can cut their traditional tracking survey down to 10 minutes, and dip in and out with LifePoints to give the real-time insight that they need. If a competitor suddenly changes strategy, a monthly brand tracker wouldn't pick that up. A LifePoints client, however, can ask respondents from the tracking survey their opinion on it as it's happening."

SOCIAL PREDICTION

Tim Warner, vice-president of insights and analytics at PepsiCo, has challenged his insight team to uncover what he calls micro-trends – "things that are bubbling up, day to day, week to week".

Identifying the trends is less than half the job, however, because many of them will not have any impact on PepsiCo's business. "We see new trends and pockets of growth emerging quickly and continuously, but, in reality, only a few sustain growth and become important," Warner says. "We have a strategic imperative to not only detect and respond to emerging trends faster, but also to be smarter in determining which to respond to and how."

Black Swan Data is a UK-based data science specialist helping PepsiCo to do this. Its brief is to find the key topics and trends that will change consumer behaviour in the future – which it has done by analysing 198m historical data points from the previous two years, and by ingesting between 50m and 60m pieces of data a day from Twitter, Instagram, blogs, forums and reviews, as well as PepsiCo sales data. It uses a forecasting engine to predict the future demand for more than 1,000 ingredients, using customer views of 72 benefits, and 52 themes, in five of Pepsi's markets.

Black Swan calls this process "social prediction", to distinguish it from the social listening that has become commonplace. The differentiator is that Black Swan doesn't rely on word frequency and sentiment analysis; instead, machine-learning algorithms predict future sales trends with less risk, helping its clients to direct their investments and R&D. The link with operational data makes the model more robust, and helps the data scientists to continuously test and refine the model's predictions.

"People broadcast much more information," says Steve King, CEO of Black Swan. "Will more or fewer people be talking about cumin in six months from now? We are listening to so many questions that we can build patterns from that data. We can observe the quality and type of conversations, and establish trends over time. And now we have so much historical data, we have a scientific measure of trends."

Warner identifies real-time, online consumer conversations as a powerful tool to keep ahead of competitors, because it gives PepsiCo earlier warning of emerging trends – and opportunities to grow – than the insight tools he had used before. He calls it a "robust, always-on trend-detection engine". "We can distinguish between the emerging trends that matter and the many that don't, and scientifically predict which trends will sustain growth, versus those that will fade away."

This way of working is changing Black Swan, as well as PepsiCo. "Originally, our model was open-ended and exploratory, and was project-based. But, in the past 12 months, that has turned on its head, because we offer a service and PepsiCo asks the questions," King explains. "We realised that our output was identical to the sort of insight from surveys and panels. We have worked to map it to real business problems." Now, more of its client engagements are continuous, packaged for self-service by its clients – almost data science as a service.

This has been made simpler by changes in the way Black Swan's client base – which includes GSK (predicting flu outbreaks) and Tesco (when is the first barbecue weekend of the year?) – buys its services. "A year ago, we would be approaching the CMO, the CTO or the chief insight officer, and trying to build a robust sales model – which was a nightmare. But, increasingly, a client insights team is cross-functional," King says. And is he happy to be paid for results? "We have three or four client relationships already that are results focused. That's exciting for me, but maybe not so exciting for my procurement team."

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In 2017, Lightspeed also created the Gravity Network, a group of media, data and CRM specialists with which it will create on-demand and digital services. Examples are ZipLine, a data-analytics platform, and Fulcrum, a marketplace for programmatic sample data.

While Lightspeed will not abandon its heritage in double opt-in panels, it is recruiting managerial talent to drive change. In May 2017, Hannah Soar was recruited as director of business transformation; then, in September 2017, Angie French – who worked at programmatic specialist Xaxis and, before that, Microsoft – joined as EMEA CEO. "She has a strong tech-based background. She's a breath of fresh air in helping our more traditional panel people get up to speed with this new world," says Frankum, who admits that, when French joined, some Lightspeed staff were nervous about embracing its new entrepreneurial side, and were scared to make mistakes.

> "If the client is using agile marketing, agencies may need more agile working practices to match their needs"

"For traditional researchers, an uncertain debrief, or an uncertain recommendation, is never a good thing. Now we're saying, 'there's lots of uncertainty, let's embrace it, learn from it and move with it'," she adds.

Research doesn't get much more traditional than Simmons Research, which proudly boasts that it has 'been documenting the lives of American consumers for over 60 years'. Its syndicated National Consumer Survey has been hugely influential as a reference for the changing preferences of consumers throughout that time. So it's not the first name you would imagine would be attracted to the Insights on Demand Consortium; nevertheless, it is one of the founder members.

Andrew Feigenson, Simmons' chief executive, joined the company in November 2017, after running Nielsen's digital organisation, where he launched products such as Digital Ad Ratings, and acquired eXelate and Vizu, two edtech start-ups that use phrases such as 'agile' and 'real time'.

Part of Feigenson's job is to put more real-time agility into Simmons. "One of the first things we did was decide that a lot of the data we collect needs to be in a

CONTINUOUS QUAL USING BOTS

"Proper qual," says Paul Hudson, CEO of FlexMR, "is moderated qual". That hasn't stopped him from investigating – and writing a white paper on – the potential of chatbots to create a continuous customer focus group.

But, Hudson says, this is far too labour-intensive to be practical – so can bots and artificial intelligence (AI) replace a human moderator?

What are you defining as 'qual' in this context?
A lot of people's idea of online qual is just open-ended 'why' questions, done at scale. I am talking about doing it in a way that allows dialogue, with moderation. We believe that dialogue is the benefit. But traditional moderated qual with a human moderator is slow and takes time to organise, whereas organisations want DIY, control, speed and scale.

From your experiments, can a bot run online qual?
The first obvious stage has to be to programme the bot to ask a series of questions, just like a survey, and you can put logic between the questions. The next thing we could do would be a simple, real-time wordsearch. Just like a topic guide, I tell the bot to look for key phrases, and then say, 'tell me more about this'.

This is useful, but it is not moderation?
In theory, it's possible to build a chatbot that would have all the constituent parts to do basic moderation – but then you have to train it. The problem is that every subject we research is different, whereas every commercial chatbot that currently exists does the same thing over and over again. Even when you train a bot, there's currently no AI in the world that can make a judgement; AI is working with rules and previous knowledge. Until you've got a form of AI that can make a judgement, you can't replace a moderator.

Can we make a human moderator more efficient using bots?
My idea is that the human would become a metamoderator. We would pre-programme prompts and topics, like we do now. The chatbots would talk to hundreds of thousands of people over a week or two weeks, and the metamoderator can keep checking in and guiding the conversation. So you're making a massive efficiency and you have still got a researcher – it's just that the role of the moderator has changed.

You argue that even this step may be years away. Are there more immediate problems in continuous qual that a bot could solve?
Recruitment is a nightmare. It takes too long, involves too many resources, and costs too much. You could use an automated bot to recruit for continuous-dialogue research. Imagine that someone visiting a website answers a question, and says her experience was very poor. The bot pops up and says, would you like to join some research for me? It asks some screening questions and then a human moderator can pick it up. For qual, we shouldn't be asking, 'how do I make panel recruitment better?' A better recruitment question is, 'how do I make the dialogue continuous?'

digital form, so it can be always on… we're going to start being able to pick up quick-moving trends and quick-changing consumer habits."

Clients' research departments are having their funding cut, Feigenson says, in favour of data scientists and technology providers, who promise quick insights that will allow brands to respond rapidly and continuously to customers. The shake-up at Simmons involves new data, as well as new ways of working. "We're starting to bring in much bigger data sources that let you get deeper than ever before. So if you're a retailer trying to figure out how to make decisions in a micro area, that's a great way to use bigger, faster data sets. But it's not the speed of the data, *per se* – it's how quickly people can make sense of it," he says.

Feigenson argues that syndicated research has expertise in methodology and transparency, and will increase their value if they acquire skills in joining their existing data to external data sets for quick insights. He isn't planning to abandon Simmons' heritage as a survey company, but, instead, use the breadth of its data so clients can have confidence in comparing fluctuations to long-term trends. He also intends to join its first-party customer data to the representative data that Simmons has been generating for six decades. "We maintain the representative group that we have, the breadth of proprietary data and the transparency around all that, but then start partnering or acquiring much bigger data sets."

Does this give Simmons a unique selling point? "That's a good question," Feigenson says. "Ask me again in two months."

New ways of working

Whatever the research provider offers, an impediment to helping clients create a continuous customer dialogue will be that agencies must also restructure to support an always-on client relationship. If the client is using agile marketing techniques, agencies may need to create more agile working practices to match their needs.

While 'agile marketing' and 'lean innovation' are overused buzzwords, many organisations have found that the techniques they represent are valuable, and they have the ambition to adopt them. There's a flaw in how they are currently used, however; there's no point being agile, or planning to constantly iterate, unless you are basing these actions on reliable, rapid customer feedback – and many innovators are struggling to access this. An example is the 'fast fail' that Twite's customers want to know about.

> "Data scientists and tech providers promise quick insights that will allow brands to respond rapidly to customers"

For instance, NewVantage Partners has long conducted an annual survey of 57 large firms on their use of data. While three-quarters of the sample claim to have found value in using data to make better decisions, fewer than a third think they have succeeded in transforming the way decisions are made to take advantage of insight for innovation.

This can be quite simple. Tom Agan, a partner at Prophet, a global brand and marketing consultancy that specialises in agile techniques, researched innovation at 30 global brands, such as Procter & Gamble

ONEPULSE REAL-TIME RESPONSES

"Often, at an internal meeting, we say, 'I wonder what people would think about that?' – and I can whack up a question and then I say, 'I can tell you what people will think'," says Kathryn Jubrail, head of strategy at ODD, a creative agency that specialises in working with fashion brands.

ODD needs that sort of timeliness; it claims to be 'informed by real-time cultural insight and data', and it gets some of that insight by using an app called OnePulse, which is designed to get consumer responses in real time.

"We are a mobile-based market research platform," says Achim Schauerte, the chief strategy officer at OnePulse. "The client platform is self-service, and they can set up mini surveys that we call 'pulses'. They're up to three questions long – very short, quick, snackable for the users."

Words such as 'research' and 'survey' are avoided when pulses are sent to users, for whom OnePulse is seen as a sort of fun social network, sharing quirky data. OnePulse's internal research shows that 77% of respondents don't take part in any other market research, and 82% don't give opinions in social media.

Users earn small rewards and games, and the platform has quickly attracted 80,000 people in the UK (the US version launched at the end of 2017). The demographics of the panel are slightly skewed to young users, Schauerte says, but it is large and diverse enough that he can deliver representative samples in targeted segments to clients in near real time. "If you want 100 responses, it could be in two, three minutes," he says. "But 1,000 responses could take 10 or 15 minutes."

Schauerte developed his enthusiasm for OnePulse as a user, working in an advertising agency as a creative. "We used it in workshop scenarios with clients," he says, "because it's so quick you can have the workshop, develop a few ideas during the day, and say, 'we're just going to test it right now'."

Jubrail has also been using OnePulse as part of the creative process. "As a strategist, it allows me to test, explore and quantify ideas almost as soon as they come into my head," she says. "I am able to explore things I am reading, or things I instinctively feel – even things my mum says to me."

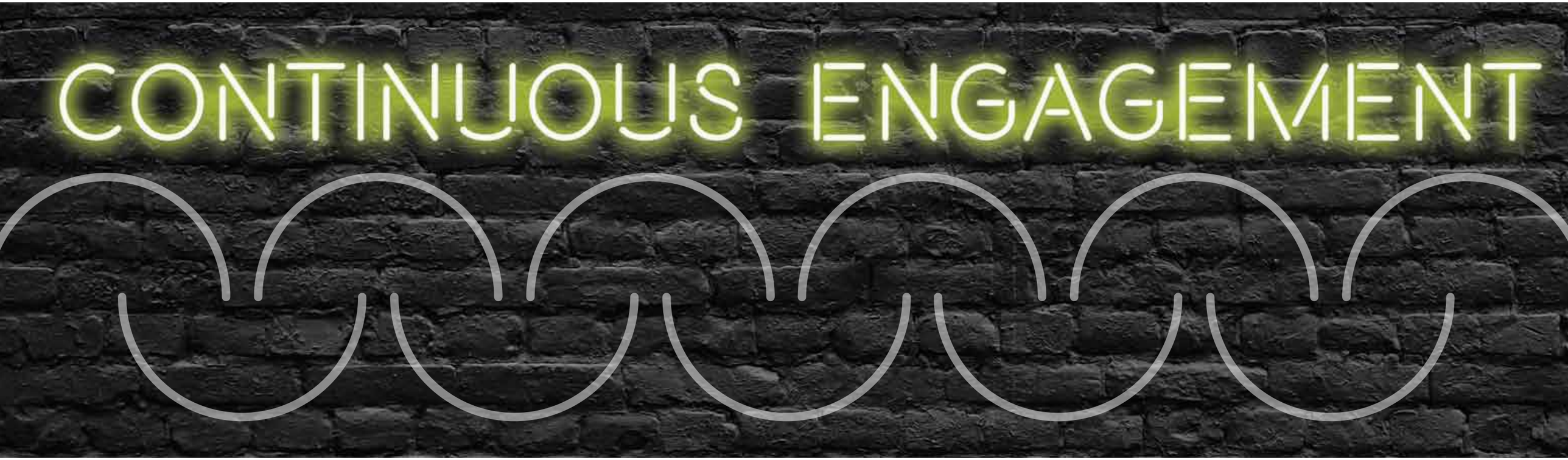
This suits ODD's way of working, which is dictated by the rapid turnaround and constant stream of new ideas that its clients need.

Even if there was the time to do a full survey on Jubrail's creative ideas, it would be too costly. So, she will do a simple three-question test – for example, asking a brand-perception question, showing some creative work, and asking again.

The results are indicative, but they help ODD decide how to refine its ideas and they allow the client to be more confident when making a decision.

"There is a leap of faith with creative work," Jubrail says. "Previously, it would sometimes come down to a subjective 'we think this' – and, if the client disagreed, it would be really hard to prove your idea was good, especially if you are showing work in progress.

"Being confident that the public understands your idea adds depth and, sometimes, a different angle. It means you can have more bravery, playfulness, wit or seriousness."



and Kraft. He found that those that had routine formal analysis of the customer response to their innovations made 100% more revenue from new products, and even more if an outside agency led the process.

A research provider that has structured itself to give continuous, iterative insight is InSites Consulting, whose clients include Unilever and Coca-Cola. It has structured client engagements this way ever since it was founded as "a crazy blend of academic visionaries, passionate marketers and research innovators".

Joeri Van den Bergh, managing partner, explains that having a day-to-day relationship is "not just to cater to their needs for agility, but also to provide a better understanding of the daily lives of consumers. We believe projects and clients benefit from iterative and consecutive learning." While some of the methodology is recognisable in any agency – surveys, qual research, reports – two aspects are unusual. The first is the way in which the work is commissioned, and projects or tasks evolve out of a continuous engagement.

"Our interaction with clients has switched from the classic briefing-planning-commissioning way of working towards a weekly heads-up meeting where clients share their projects and discussions. Often, this won't lead to formal commissioning – with briefings and request for proposals (RFPs) – but it can lead to an explorative brainstorm, or to a concrete topic guide or questionnaire proposal," Van den Bergh explains.

The second unusual aspect is the way the work is done. Van den Bergh is one of several agency bosses in this feature who looks for 'T-shaped' members of staff, trained to have broad project-management skills, but also narrower implementation skills – people who can adapt to a different type of work depending on what needs to be done that day, based on agile processes. This means the teams are structured into fluid 'squads', with short, daily, stand-up meetings to adapt the squads to the job that needs doing.

> "While research has creative thinkers, it also has working practices that do not move at the speed of a start-up"

Incorporating feedback from the client and learning from the research is a daily process. To make this work, the company uses automation to get rapid respondent feedback and to convey this to clients quickly. It uses AI and bots, for example, which save 80% of moderation time, according to InSites. Automatic PowerPoint reports take half the time to create than handmade reports.

Van den Bergh claims constant communication is the most appropriate response to the rapidly changing needs of consumers (he characterises this consumer trend as IWWIWWIWI – 'I want what I want when I want it', and says it applies to clients as well) and the pressure on brands to respond quickly, even with imperfect information.

"This has made it crucial for companies to shorten their product and innovation cycle, so we have to reduce the 'total cost of insight'," he says. "We tend to think agile methods are more appropriate for tactical research projects – and, of course, they are very useful when a

JWT ELASTIC GENERATION

When J Walter Thompson Intelligence wanted to produce the 'Female Edit' of its 2016 report into ageing, called *The Elastic Generation*, it used Sonar – an online tool from its in-house research team – to survey 248 UK women aged 53 to 72. It took off-the-shelf data from the JWT Women's Index Study, a global quantitative survey of women aged 17 to 70-years-old, but it also needed to speak to women to get qualitative insights.

"Traditional qual research would have been great if we could have commissioned it," says Sarah Tilley, a consultant in the Innovation Group at JWT, part of JWT Intelligence. Cost was a factor, but the turnaround time was short, and the nature of the insights it wanted to draw out meant focus groups might not achieve the depth needed in the time available. "Focus groups require facilities, plus all the time it takes to prepare and do them, and do the transcriptions. We wanted to get some quick insights. We also wanted to do it in a seamless way," Tilley explains.

JWT used Toluna's QuickCommunity to recruit 24 women in the target demographic for a week-long, online discussion panel. It seemed a risky strategy; if JWT's hypothesis that the over-50s are diverse and dynamic was incorrect, an online panel would probably be the wrong methodology to learn insights from them – but it managed to get interesting insights in a fraction of the time that traditional methods would have taken.

Tilley singles out the adaptability as an unexpected benefit of an online panel. To accelerate insights, the moderators could generate a dialogue that would iterate and refine their requests as the work developed. "The next day, we could directly message them to ask, 'you told us this – can you follow up on that?'," Tilley says. "I was surprised at how interested the respondents were in having a conversation together. I wasn't expecting that. When you are in a focus group, you know people will talk among themselves, but in this online group, people were asking 'when is everyone coming back online?'. It was a community of friends who didn't know each other. The respondents were everything we hoped for – we got great quotes."

client wants to have a fast, overnight reality check – but the iterative cycle of hypothesis testing, quick learning and testing again is also useful to improve long-term projects."

"Innovate or become irrelevant"

Whether it's helping to innovate, embracing bots and imperfect data, or adopting agile working, the need for a real-time, insight-driven customer dialogue will drive change in the research industry. While research has creative thinkers that most sectors would envy, it also has shibboleths and working practices that do not move at the speed of a start-up – or, arguably, even at the speed of their clients.

The founders of OnePulse (see panel, p38) were inspired to launch the app partly because, in their former jobs as management consultants, they helped their clients to use digital platforms to respond better to customers. When they commissioned research into the topic, they realised the researchers they had been working with made up the sector that wasn't transforming quickly enough.

If continuous customer dialogue means incorporating data and skills that, traditionally, live outside the world of market research, it may also bring into the sector skilled people whose background is outside the industry, and who want to turn it on its head.

An example is Matt Gaffney, the CEO of four-year-old Branded Research – which has recently joined the Insights on Demand Consortium – who cheerfully concedes that he's a start-up entrepreneur, rather than a researcher.

"This industry has, traditionally, been very slow-moving, and maybe that was OK," Gaffney says. "But it's certainly not OK any more and, frankly, it hasn't been for a long time. Real-time insight, customer response, customer feedback and behavioural tracking isn't new – it's the nature of the world.

"There are a number of places from which to get this now that are not traditional market research companies. It's a transformative time for the industry – and it's time for the industry as a whole to respond."

Branded uses APIs to deliver targeted samples in a programmatic way to insight providers, with customers both inside and outside traditional market research. For example, Gaffney will give samples for start-ups who deliver customer feedback using webcams or mobile surveys inside a web application. He is in no doubt that start-ups will take a slice of client business because they don't have existing ways of working.

"If you look at the survey world, for example, there are agencies that have been doing tracker work on behalf of big brands, every quarter. They don't really want to pay people to take the study. The study is way too long. It's obnoxious to take it. It's not really getting into the right hands.

"At some point, that agency has to sit with the client and say, 'we need to change how we're doing this'."

Gaffney argues that researchers have to recognise the need for change: "Those agencies are scared to have that conversation, because it is an acknowledgement that the data they have been collecting for so many years maybe isn't that hot.

"Somebody is going to enlighten your client," he adds. "So innovate and adapt quickly – or you quickly become irrelevant."

At Toluna, Twite is optimistic that research businesses will respond. "Some research firms have moved successfully to become trusted advisers to business decisions, such as which markets to enter, with which products, for which customer base," he says.

"They are adding value and moving quickly, and some research businesses have been extraordinarily quick at reinventing themselves and targeting opportunities.

"Management consultancies are often seen as the next big thing. But there's a real intersection between management consultancies and the big research firms." ■

THE INSIGHTS ON DEMAND CONSORTIUM

In January, Toluna launched its multilateral group of individuals and companies, from all industries, to discuss research that is automated, self-service, and in near real time. The consortium isn't a business alliance, but aims to be a forum for its members to focus on topics such as how to scale expertise, and the requirement for real-time consumer insight. It will also try to solve problems in providing this, such as the fragmentation of research tools and technologies.

Toluna stresses it is not a club of researchers. "This isn't us trying to build something to sell," says Paul Twite, managing director, Toluna, Europe and MENA. "This is us recognising that the industry has shifted. We decided to create a neutral ground for discussion, a segment that could include artificial intelligence businesses as well as research firms. It could include management consultancies and media agencies. The common theme is having a consumer or customer base that is moving at the speed of the on-demand economy. How do we, as a group of businesses and individuals, respond to those challenges?"

So far, Toluna and its sister agency Harris Interactive have been joined in the consortium by research companies, digital agencies, and some large clients, including Procter & Gamble, L'Oréal, Unilever and Nestlé.

THE VOICE OF THE MAINSTREAM

Trinity Mirror, now rebranded as Reach, is best known for the *Mirror* but, as the UK's largest regional publisher, its research has delved into the differing perspectives of readers across its portfolio. **Andrew Tenzer**, its head of insight, explains. By *Jane Bainbridge*

There is an incongruity to travelling to Canary Wharf – that bastion of London capitalist vigour – to interview Trinity Mirror's head of insight, Andrew Tenzer, about brands being too London-focused.

Passing from the shopping centre with its Paul Smith and Montblanc shops to a newspaper business on the upper floors of Canada Square is a long way from the Fleet Street of old. But everything is changing in the newspaper business, where it's now all about digital-first strategies and the need for in-depth customer insight is greater than ever.

Indeed, there are even more changes in the time between interviewing Tenzer and publishing this article, because, following its purchase of Express Newspapers for £127m in February, it's now being rebranded to Reach. The fallout of that has yet to reach Tenzer.

Tenzer's insight work has been broad and varied. It has caused some ripples in the industry for its exposure of just how alienated so many people in the country feel from the London-centric brand communications pumped out by so many advertisers.

It's interesting that a man who's spent his whole career in London working predominantly on media brands, has recognised and explored the disconnect between London-based media folk and the rest of the country so well.

His mum worked for David Frost and John Birt, so the thrill of the media hit Tenzer – and his sister who also works in research – from an early age. After university and a brief spell trying to be a musician, he got into research, initially at IFF Research, before heading to Channel 4. He stayed there until 2015.

Working for brands he believes in, and has an affinity with, has been an important factor during his career path – as well as influencing the insight he's worked on once there.

So, while he talks about the training he got at IFF as being important, he also admits that doing a lot of financial research there wasn't a particular passion for him - "partly because I never really understood it". But Channel 4 was entirely different and working in its insight department had been an ambition of his.

After a successful stint at the independent broadcaster and then the BBC – which included winning awards – Tenzer joined Trinity Mirror last year. It was another business that he felt aligned with his personal values.

"The opportunity to come in and develop the insight function, particularly in the commercial space, really attracted me to the role."

He has no time for the notion that newsbrands are losing their influence – citing the *Mirror*'s organ donation campaign and the *Liverpool Echo*'s work to gain justice for the 96 people who died at Hillsborough. More recently, *Manchester Evening News*' (*MEN*) coverage of the Manchester bombing was, he says, very supportive and sensibly reported.

But joining Trinity Mirror at the time of Brexit put the nature of our splintered nation in sharp relief. The political divide demonstrated by the EU referendum vote triggered research looking at the gaps emerging in how brands are trusted, finding that many are increasingly negatively associated with the London-based

establishment, especially by people who don't live in London.

The report based on this first wave of research, 'When Trust Falls Down', became Tenzer's calling card, as the evidence was clear that there was a significant gap in perceptions between agencies and the consumers they were looking to target.

The idea for the Brexit research came from creative advertising's annual awards festival.

"We were talking about Cannes Lions and how ridiculous that whole event was. We were thinking of something we could produce, which could counter the elitist marketing and advertising industry perception on things. The idea that you're out at Cannes Lions sipping champagne and celebrating creative awards that probably don't have that much relevance.

"We felt we could legitimately talk about it, but we also knew it was quite provocative because I don't think many media owners would want to talk about declining trust in advertising and brands," he adds.

"I've probably presented *When Trust Falls Down* externally around 50 times. We also have our Brand Relevance Index (see box, p48) to measure how our brands are performing or resonating outside London. It's a great door opener," he says.

Tenzer worked with Ipsos on the trust report, saying: "For a subject like that, you need an agency with the gravitas of Ipsos to give it that extra layer of credibility."

Research like this is useful for agency relationship-building and generating headlines, and Tenzer currently has four or five studies in the pipeline that are "all part of our process to prove that we represent the mass market of Britain like nobody else does – we are the voice of the mainstream." You don't say tabloid these days, it's been rebranded to mass market.

While much of the insight team's work is focused on commercial and supporting Trinity Mirror Solutions – which incorporates working with its creative solutions team on innovation – they also work directly with editorial.

"We'll do a piece about the repositioning of one of our titles, and then another title will get wind of that. It starts a domino effect. Primarily our budgets go towards commercial, but editorial are really supportive of the commercial side of the business."

Ongoing tracking across all of its 150+ brands is a challenge. Instead, it runs its Mouthpiece panel – made up of 5,000 of its readers.

"We have a panel manager, because of the level of work required. In 2017, we probably did about 70 pieces of research through that panel. It's quite relentless – we're constantly recruiting," he says.

The type of research for which it uses the panel varies. "It can be supporting pitches, coming up with content ideas for creative solutions, doing research about redesigns. It might be research about columnists, the level of sport within the *Sunday Mirror* – it could be anything."

CV
ANDREW TENZER

2017 – present
Head of group insight, Trinity Mirror

2015 – 2016
Senior research manager then head of insight, BBC Global News

2010 – 2015
Senior research exec then research manager, Channel 4

2010
Senior research exec, Illuminas

2008 – 2010
Research exec, IFF Research

2007 – 2008
Airtime management assistant, Channel 4

Trinity Mirror also uses Mouthpiece for joint studies with media agencies. Last year, this included a study 'Breaking the Filter Bubble' with Spark Foundry, part of the Publicis Groupe, which again looked at identity in a post-general election world. It has also worked with OMD to research the future of parenting.

Digital-first strategy

Trinity Mirror's scale digitally is large – 40 million adults every month in the UK, across print and digital. And it's not just a national phenomenon. "The *Liverpool Echo* or the *Manchester Evening News* have huge numbers – more than six million a month for each website. From a commercial perspective, we tend to sell packages to run advertising across our portfolio," he says.

"The current conditions and societal shifts work in our favour. What we're seeing is people retrenching from globalisation, to what is safe and trusted, which is local. I think people have an emotional connection with their local news brands."

The role of local and national journalism is slightly different; many argue that a strong local press is vital for democracy – to hold local government to account and represent smaller interests.

Tenzer says: "National and regional play a slightly different role, but they complement each other. We talk a lot about explicit and implicit geotargeting – explicit is about going into people's own turf into a trusted environment like the *MEN*. People then think 'these brands care about me'."

The over-arching role, says Tenzer, is proving that Trinity Mirror's content is premium. But his definition of premium differs from some. "*Love Island*, for instance, can make very successful news on our website, but there's a kind of snobbery from advertisers that think that type of content is not premium. It is premium – premium doesn't just mean highbrow," he argues. "Premium is something that adds value to my life and makes me feel happy. You only have to look at the rise of the budget supermarkets to show you where modern Britain is at. I can understand, in the print world, why those biases take place, but I think it's time for everyone to reappraise the concept of premium in the digital world."

Tenzer is keen to introduce more innovative research techniques and will be doing more behavioural economics research with house51.

- Carrying on the declining relevance of brands and advertising theme, it will question if the challenges to re-connect with consumers are even deeper than previously thought.

It is building on the latest academic research on cognitive diversity, exploring how the marketing industry has a different 'thinking style' to the mass market. The premise being that thinking styles drive our behaviour at an unconscious level and that many people working in advertising have cognitive and behavioural biases that mean they see the world differently to the public.

BRAND RELEVANCE INDEX

The first wave of Trinity Mirror's Brand Relevance Index was launched last summer to measure performance or resonance outside London. It looked at 56 brands.

"The thinking behind it is local identity is becoming increasingly important," says Tenzer. "Brands have lost touch a little bit with mass-market Britain, particularly outside London. So, rather than focusing on brand metrics relating to the individual, we ask how well that brand speaks to people in a local area."

The second wave was released in February and was extended to 170 brands. "It's a door opener to contact brands – it tallies with a lot of what they're seeing and helps validate some of their own research."

Based on a survey of 2,000 UK consumers, each of the 170 leading brands were ranked on their relevance to consumers. That score was calculated by a brand's ability to connect with consumers across the country and not just in London.

The score for inside London is subtracted from the score outside London, to create the overall relevance score. A positive score implies the brand is connecting more with people outside London than inside, zero implies equal connection, a negative score implies the brand is connecting more with those in the capital.

The top 10 brands were: B&M +31; Co-op +20; Aldi +18; Matalan +15; Screwfix +14; Asda +13; Dunelm +12; wilko +11; RAC +11 and Lloyds Pharmacy +9. Category-wise, supermarkets performed best (+1); all others were in the negative, with telecoms the worst (-17).

Overall, 74% of people in the UK said their local area is important to their identity – a stronger emotional relationship than nationality, region, postcode and the north/south divide.

In 2017, 61% agreed with 'most advertising doesn't portray the lives of people in my local area', up from 56% in 2016.

He was particularly surprised reading through manuscripts, and talking to the people running the focus groups, from Newport. "I was shocked by the level of distrust and anti-establishment feeling taking place there, and how forgotten some of these people feel. Had I joined Trinity Mirror a year earlier and I was doing this type of research, I probably would have thought that we would vote to leave the EU."

The theme of our disconnected society is running deep through Tenzer's work at Trinity Mirror and he has been particularly affected by the findings of the different focus groups it's run – seeing just how great the chasm is between the London focus groups and those from other parts of the country.

"We don't want just to do focus groups in London and in Manchester. We want to go to places that aren't traditionally used in market research because we want to get that additional viewpoint. You almost have to exclude London, if you want a real sense."

He found the same divide with the OMD parenting research. "It was amazing how out of touch brands are with parents. Only 19% believe advertising represents their experience of parenthood, and goes down to something like 5% for an older demographic. We had all this wealth of data, and then we had a panel discussion afterwards with a couple of young, London-based mother bloggers. It was amazing how most of the panel then just ignored all of the data that was presented to them and reverted back to their London bubble."

Regardless of the Express deal, all newsbrands are under huge commercial pressure, so how does that affect the role of evidence-based research?

"Certainly here, the value of insight is very high. When I started in research, it was research and insight. Now it's just insight. People don't really like using the 'research' word, but you can't get the insight without research.

"We know how important insight is, but I think it's partly how you sell it in. The reason research or insight can get a bad name is if you produce insight that isn't actionable. If it's not actionable insight, then I'm not going to put it in front of someone, because it's useless to them." I

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RELISHING A CHALLENGE

UK recipe-box company Gousto has put insights at the centre of understanding what people want to eat, using data to launch new ranges and predict what recipes will tickle customers' tastebuds.
By **Katie McQuater**

A decade ago, if you wanted to have dinner delivered to you in the comfort of your own home, you would have been limited to whatever takeaway restaurants were in the vicinity – and the chances are, they wouldn't offer particularly healthy choices. For that, you'd have to head to the supermarket to buy fresh ingredients, consult a cookery book, and do it yourself. But what if you could bypass the first two steps?

Today, rapid disruption in the grocery sector, driven by advances in technology and consumer desire for convenience and wellbeing, has resulted in an alternative to supermarket food shopping – the rise of the cook-at-home meal kit.

UK recipe box subscription service Gousto was founded in 2012 by Timo Boldt and his then partner James Carter. Though he loved food and cooking, Boldt found he had little time with his career as a hedge fund manager to cook, and when he did, he was wasting a lot of ingredients.

These two pillars – convenience and food waste – are at the centre of the start-up's approach to food delivery. Each box, selected by customers via the Gousto website or app, contains only the amount of ingredients required for the recipe, and customers can choose from 25 recipes each week.

The success of Gousto's direct-to-consumer model is dependent on the company's ability to understand what its customers want to eat and, as such, it has invested heavily in data tools and expertise, to the extent that Boldt describes it as "a data company that happens to operate in the food world".

ABOVE Each Gousto box contains exactly the right ingredients for the recipes selected

Boldt says his vision for the company was to allow the customer to drive ideation around the products – for instance, monitoring which recipe boxes customers buy most to tailor the products to their preferences. "My philosophy was, can I build a framework that means innovation equates to ideation, plus selection, plus execution – and is there a way that the ideation can be done by the customer? Can I give customers recipes and see what they look at, what they buy, to fine-tune the menu to their tastes?"

The company looks at recipe feedback given by customers on its website, as well as data generated when orders are placed (metadata associated with each recipe includes ingredients, cuisine, cooking method, cooking time, and so on) to measure the performance of specific recipes and build an understanding of preferences. Boldt describes the data insights derived from the Gousto website as a dynamic segmentation model of sorts; by observing what ingredients people like and don't like to eat, the company can start to understand their behaviour.

This data is then merged with a cluster segmentation, based on people's attitudes and attributes, such as favourite cuisine or how many people they are cooking for.

"On top of this, we run two layers of deep learning, which allows us to build a personalisation engine that shows exactly what you are most likely to want to eat," says Boldt. The model improves as more data is generated: "The more orders you place, the better our orders become."

Though the company is biased towards funnelling spend towards data science and investing in building artificial intelligence and automation, it also uses focus groups to complement its strategy, particularly around new product development.

Natalia Paine, the brand's insights manager, says the company uses consumer research early in the process to give context on behaviour and motivations when coming up with a new concept. "Focus groups are most important in the early stages, when trying to explore an area more broadly – when we are exploring particular customer groups' motivations and behaviours, or when trying out concepts for a new range of recipes to understand what people's actual needs and wants are, along with how we are meeting them. Focus groups offer context for a lot of what we see in comments and through other means throughout the year. In them, we can probe the 'why'."

Softer feedback

The new Boost and Balance range, for instance, was launched in January and offers recipe boxes for meals under 600 calories, and was informed by customer insights and 'softer feedback'.

"We couldn't possibly do this just based on machine learning and data insights," says Boldt. "We went out to customers and tried to find out whether we should call it 'healthy January', or 'vegan', and we called it Boost and Balance, based on customer interaction. So, there's a really important role for traditional marketing when it comes to proposition development for the core segments."

But what people say and what they do don't necessarily match – a constant issue for researchers, and particularly pertinent when it comes to food and health. "We often have focus groups tell us that they want healthier recipes, for example, and then we look at the data and the people who gave us those answers and what they buy – and they buy pork and sausage. Reconciling the two worlds is sometimes hard," admits Boldt.

Another insight – that people want to cook a ▸

special meal once in a while – led to the launch of a premium range, Fine Dine In, marking a step away from recipes focused on healthy eating and convenience. "The main occasion of the midweek meal is very fast and nutritious; however, people still want a special night once a week," he explains. "It allows customers to use Gousto in a slightly different way than they're used to."

Perhaps surprisingly, the brand's customer demographic is skewed towards those aged 35 to 50, cooking for their families; it's not necessarily the urban millennial working long hours who doesn't have time to shop.

Boldt says the company isn't trying to convert people to cooking, however. "I'm not in the game of telling you that cooking is great. I'm trying to help customers who already cook. If you look at who's cooking every single day, it's probably not the 25-year-old guy working at PwC in London. It's more likely the 45-year-old woman with a young kid living outside Leeds." He says the company's customer demographic is skewed towards females: "Sadly, home cooking in the UK is still hugely traditional and done mostly by women, whether you like it or not."

When it comes to evaluating the food trends on which to base new recipes, the company starts by examining what customers are searching for on its website. It usually sees surges in traffic before trends are covered by the media and will build new propositions based on the trends it deems substantial enough. Gousto recipes include vegetarian, plant-based, gluten- and dairy-free options, and though it hasn't yet ventured into kosher and halal ranges, Boldt says this is something the team "constantly re-evaluates".

Data mining in this way also helps to give insights into people's relationship with food – for instance, when it comes to gluten-free, some consumers see it as a trend or health benefit, whereas, for others, it is a dietary requirement that has an impact on how food is handled in a warehouse.

Success criteria

When trialling a new range, the brand initially launches one single meal and invests some marketing spend on promoting it. It then looks at the take-up ratio compared with other meals to infer if the recipe appeals to one customer segment or all of them, with the aim of maximising the recipe's relevance for all segments. "There's quite a bit of prioritisation framework in the middle, based on our customer understandings," says Boldt.

The success criteria for new product development is how well the firm retains customers, he adds. "If they don't retain well enough, but we can get sufficient amounts of them, we then start to ask: could we retain them better if we simply had twice the choice? Is it because the meals are too long? It's a combination of data richness and automated process, but following up and going much deeper into behavioural questions."

BELOW The brand's demographic is skewed toward 35- to 50-year-olds

ABOVE Gousto co-founder and CEO Timo Boldt says the success criteria for new product development is how well the firm retains customers

Being able to access in-the-moment insights through automation creates a short cycle for research and development, allowing the company to identify quickly whether or not an idea has scale. Boldt attributes this to Gousto building "very narrow data IP around forecasting, automation and personalisation to the customer".

Often, ideas don't pan out as expected, but it can be just as beneficial for the company to understand what doesn't work. At any given time, it runs a number of new product development, marketing channel and customer tests, while website user experience is tested once a week.

Net Promoter Score is also managed by collecting weekly feedback on particular recipe box numbers. Paine explains that as well as looking at the overall score – calculated by taking the percentage of promoters and subtracting the percentage of detractors – the company also breaks down the complaint areas that are preventing a perfect score. "This allows us to understand what areas have the biggest impact on customer satisfaction," she says. "These categories include 'range of recipes', 'delivery' and 'ingredient quality and shelf life'."

Gousto can then track how changes improve complaints, she says. "The more points off in a category, the more important it is to tackle. We also look at this by box size, diet type and different factors." For example, when it was continually noticed that 'range of recipes' was a substantially bigger cause for complaint by

customers, the company increased the number of vegetarian recipes by a third, adding plant-based recipes.

The firm keeps all its work on NPS and insights in house. Boldt says: "I'm a big believer that if you want to build a long-term successful business, you have to obsess about your moat strategy – how do you protect the castle in the future? To widen the moat, you have to own the data science and the technology."

Data insights are available to every team within the company in real time, with teams able to create their own dashboards. Boldt gives the example of someone working on the procurement operation, responsible for buying onions. "They have all the information available to create dozens of dashboards on onions. That person can really understand everything, from shelf life to consumer behaviour to working capital by supplier, freshness and supply-chain risk."

Paine adds that people across the business gather their own insights, ranging from the digital product and customer services teams to the SEO manager. "We're all sharing what we learn with each other, so that we can build upon existing knowledge."

As well as helping to predict what recipes customers will buy, the company uses data to inform its own purchasing. Through a centralised data warehouse, a forecasting algorithm uses information about past orders to predict how much of each ingredient it will need to fulfil forthcoming orders, so reducing food waste.

The system gives the company an advantage over supermarkets, many of whom are grappling to retro-fit data models on top of legacy systems. "Their challenge is that they have no idea what's in store," says Boldt. "It takes them 48 hours to find out what was sold and another day to ship it to the store."

Gousto isn't the only brand offering recipe-box delivery in the UK, with its closest competitor being HelloFresh. One criticism of the subscription box market has been its long-term viability: while it's easy to draw consumers in with discounted initial offerings and one-off purchases, is it sustainable in the long-term? Boldt thinks so.

"The barriers to entry in this market are quite low so lots of new competition are entering the market, but barriers to scale and to overcome the retention topic are significant. We've invested millions into capability, because if you don't, you will have issues.

"I think what you see today is the absolute tip of the iceberg. There are roughly one billion meals eaten in the UK every week, and we're selling a tiny, tiny percentage of them. This market is so enormously large and, for the past 50 years, supermarkets have built up a supply chain that is no longer fit for purpose for the next 50 years."

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Inside knowledge

During **Nick Rich's** time at InterContinental Hotels Group, the insights function has learned much about customer behaviour and, as he tells *Rob Gray*, it has changed the way those insights are used

ABOVE The Dubai Festival City InterContinental

A pair of sleek Teslas, side by side at electric charging points, catch my eye as I pull up in the car park of the Crowne Plaza Gerrards Cross. Here's an immediate indication of the need for hotels to move with the times to keep customers happy, and I haven't even set foot in the lobby yet.

I'm here to meet Nick Rich, vice-president, global market and consumer insights at InterContinental Hotels Group (IHG), one of the world's leading hospitality businesses. It is present in 100-plus countries and owns more than a dozen hotel brands, including Holiday Inn, Kimpton, Hotel Indigo and, of course, Crowne Plaza and InterContinental Hotels & Resorts.

All told, IHG has more than 5,200 open properties, which offer more than three-quarters of a million hotel rooms combined. Roughly 80% of its properties are run through franchises, but in emerging markets – such as Greater China – the business is predominantly a managed one, which means IHG takes responsibility for operating hotels on behalf of site owners.

Rich has been at IHG for 11 years – first as director, consumer insights EMEA, before taking on his current role in April 2013 – and he has been the driving force behind the evolution of its insights function. The 20-strong core global insights group is mainly focused on strategy and brand, and is split, geographically, between the hotel group's main regions. There are another 10 or so people working on specific platforms, such as IHG's huge global customer satisfaction programme, through Ipsos, which collects 3.5m interviews a year.

Finally, there are analysts positioned in pockets and functions across the business, such as digital and finance. These aren't necessarily straight-line reports into the group, but they work closely with insights as part of what Rich describes as the collaboration between data and insight. "It's a fairly simple, straightforward structure," says Rich. "I guess it has to be, and we are all connected. But, increasingly, there are people who have taken on more of an account role. Some people are focused on sales, some on certain brands, and some of us are focused on more global strategy for the board. So we divide and conquer. That's the structure I built to service the business."

The team mantra is 'knowledge is for everyone'. Marketing is the number one partner because it is right on the doorstep, but the aim is to focus on the whole business. Indeed, the big plan is for insights to become a horizontal function, partnering with departments such as finance, HR and operations to give corporate, business and customer knowledge, as well as more traditional marketing research. Rich is at pains to point out that everyone in IHG needs to know about the customer.

An insight group that delivers business-critical information is vital because the company operates in a hugely competitive sector. "IHG faces all the challenges of a global brand – not least how to maintain style and standards worldwide while being sensitive to local tastes and norms," says Steve Wills. He is founder and director of Insight Management Academy, provider of consultancy, training and benchmarking to insight teams, and organiser of Insight Forum, a quarterly best-practice event in which IHG participates. "And it competes in an

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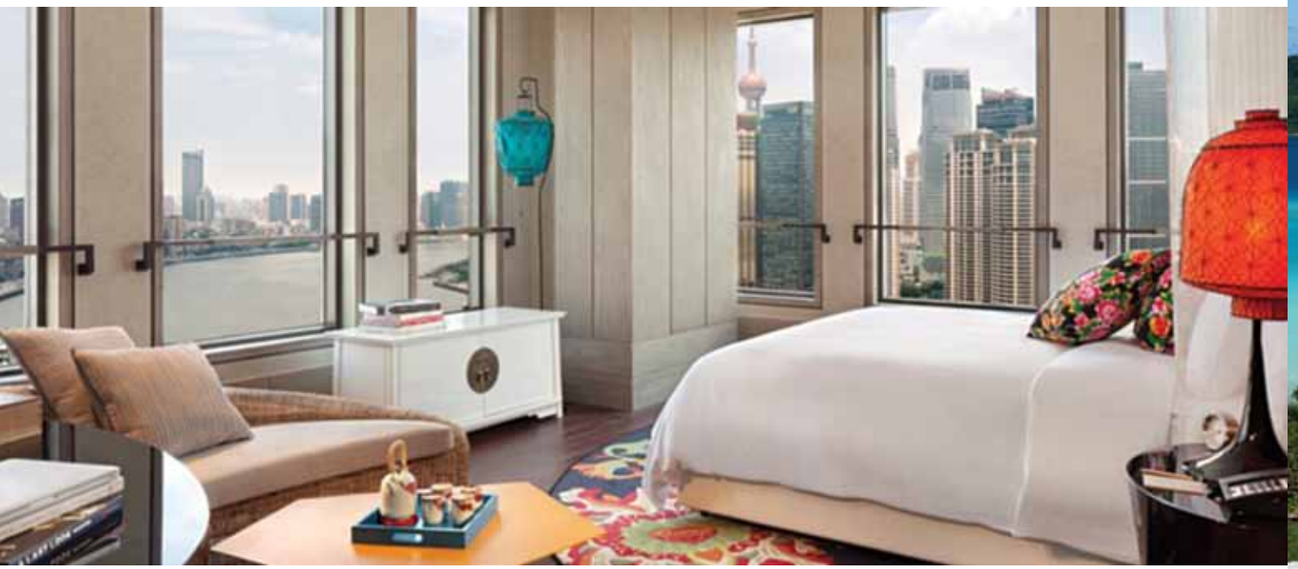

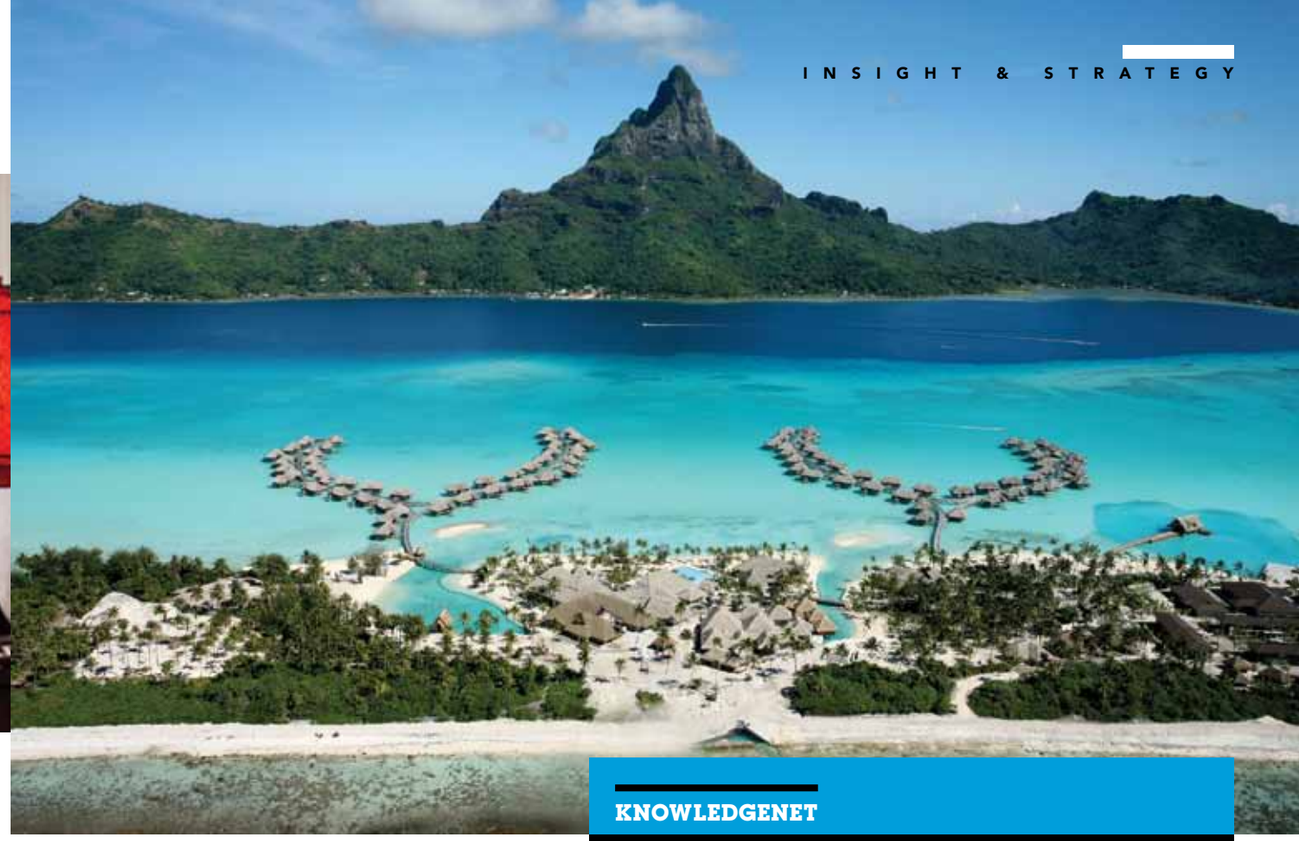

ABOVE A room at IHG's Hotel Indigo Shanghai on the Bund

oversupplied market, where expectations are rising all the time. So, the insight team has to be very switched on to short-term requirements and performance, while trying to see where the world is going and what future needs will look like. This is all the more important because it takes time to build hotels in new places and refurbish existing ones if tastes change."

Identified needs

Understandably, there is a slightly greater focus on IHG's leading brands – such as Holiday Inn, InterContinental and Crowne Plaza – with much emphasis on keeping the product and service relevant and up to date. However, newer brands developed by the group to satisfy 'identified needs' are getting increasing attention.

Hualuxe is a case in point. Originally a Chinese brand, the boom in outbound tourism from China has led IHG to explore how Hualuxe might be developed and adapted for Chinese tourists visiting top-tier city destinations, such as London, Paris and New York.

Of course, the growing Chinese domestic market presents opportunities too. Rich, who travels quite extensively in his role, was in China recently and found himself fascinated by its rapid pace of change. "I was struck by the fact that everyone is on electric scooters, and the buses are all turning electric," he says. "Their efforts on the environment are not just one step ahead of the rest of the world, they are head and shoulders in front with reinvention; their innovation is incredible. You have to adapt to that life in your hotel design."

As well as exploring trends in eco-friendly initiatives, mobile booking and in-room entertainment, IHG has adapted and tested some of the compelling creative coming out of China for use in other parts of the world. Together with the US, the UK and Germany, China is very much a key market.

Opinion capture

As a sector, travel is unusual in having its own, dedicated cross-sector feedback channel in the form of TripAdvisor. IHG takes careful note of the comments left on this influential platform, but it also has its own huge opinion-capture mechanism – 3.5m customer interviews a year. The vast majority of these are from loyalty programme members – with response rates to a concise survey standing at around 20%.

Rich confirms there is correlation between TripAdvisor reviews and what IHG receives via its own customer feedback. However, the advantage with the latter is, typically, a far greater level of detail about issues or grievances, which allows general managers and frontline staff to spring into action and fix problems fast.

The launch, this year, of a new global reservation system – developed in partnership with travel IT powerhouse Amadeus – is intended to improve the booking experience for customers. But it also represents another step forward for insight by generating "a wealth of information to understand where people are coming from, what preferences they have and what experiences they are looking for".

IHG has also worked with market research behavioural science specialist The Irrational Agency to try to build a clearer picture of what is important to customers during their 'guest journey' by addressing the nuances and potential 'pain points'. The research largely confirmed what IHG already knew.

"But there were spikes we had not necessarily seen before," says Rich. "For instance, about that period on arrival – the experience you have with the front desk and the journey to your room."

This, says Rich, got the team thinking about what could be done to help ease those pain points by adding what it termed moments of truth – positive little interactions with staff that

KNOWLEDGENET

First, there was i-site – a searchable, online research library used by a couple of hundred people within IHG. This did an adequate job, but it fell far short of connecting the huge amounts of useful data to be found across the business. So, in 2013/14, IHG brought in KnowledgeNet as the place to go for information.

"It is crazy that knowledge is kept in siloes," says Rich, "so we broke out from that."

KnowledgeNet is a machine-learning, knowledge-management platform developed by US experts Northern Light. It is an open-source solution used by 3,700 people across IHG and there are dashboards for everyone from the group CEO to local sales teams. "We have more information than we know what to do with," says Rich. "The key is where you get the nuggets and insights quickly, and how you get that out to the business."

With KnowledgeNet, IHG has taken a massive step forward in pooling vast amounts of data and insight from across the group and making it easily accessible. It's estimated the value of time saved by KnowledgeNet users through self-serve access has already topped £1m.

"It frees us up for other research, but also to do the most important thing – communication," says Rich. "Because you want people to be making more informed decisions using the knowledge we have got. That involves getting out and speaking to more people, using whatever the tools are – our own Twitter feed, memos, newsletters – to get the message out."

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bring something different and memorable. For example, helping families on leisure breaks with "camera-worthy" moments. "We wanted to create more moments where staff could help and be with guests, and interact with them, because we know that is such a powerful experience," says Rich.

One of the big issues the research industry faces, Rich contends, is being heard within organisations. The move from research to insights has taken place because insights is about finding the underlying truth, the penetrative observation that leads colleagues to take action. Now, more than ever, in a world of data and knowledge, he asserts, the insights group needs to talk the language of business and avoid falling into the trap of doing research for research's sake.

"We have made a key push and really created a strong partnership with finance," says Rich. "There are two objectives for me. One is that we want to prove the worth of research and insight, so – if we have helped change a decision – what has the material, bottom-line impact been?"

The second objective is helping the business to prioritise. "We have been asked to do every kind of research possible with hotels – from the quality of sausages on a breakfast bar right through to new opportunities in developing markets. When faced with an abundance of requests, and the need for support and partnership, we have to have some way of saying: X is a priority, but Y isn't. By tracking it back to our bottom line – our sources of revenue growth – we can have those conversations, get ourselves out of tricky situations, and not have to say 'yes' to everybody."

IHG AND VIRTUAL REALITY

IHG's European brand team began using virtual reality (VR) technology about 18 months ago, predominantly to showcase concepts and designs to owners. Last year, the Europe and global insights teams got together to find an answer to the question: 'Could VR be as good as a physical space for researching new designs or concepts?'

They repeated research undertaken by the Europe insights team for the next generation Holiday Inn guest room – but, instead of just using the physical prototype room, they also used VR to replicate the look and design.

Members of the public were invited in, and half were shown the physical room first, then given the VR headset; the others saw the room using VR first and then went into the physical space.

"We had a build-out of a hotel room in a portable building," says Rich. "It looked like a box outside, but walk through the front door and it's like any hotel room – amazing! We had another group in the office exposed to the design through VR, and then we swapped them. Really, it was research on research, to check that VR could give you a decent response, and people loved it. We think there was a bit of a high because the VR was a novelty, but when we got down to the question of 'does it give you a feel of the room', they said it was identical to the real room."

One concern ahead of the research was whether smaller details would be missed in VR, but that was not borne out – people even noticed the lighting. VR also gave a sense of space and depth: nobody walked into the physical space after seeing the VR room and said they expected it to be bigger or smaller. The main comment was 'ah yes, I've been here before'.

There are numerous advantages for IHG in using VR in its research – not least, cost. Creating a space in VR is about 75% cheaper than building a physical version. There are also speed and flexibility upsides. It takes days, instead of months, to create a virtual space and, with just a few clicks on a computer, it's easy to come up with hundreds of variations. Moreover, using portable VR headsets means designs can be taken to consumers, allowing for international testing at reduced cost.

EFFECTING CHANGE

AS CEO OF GIRL EFFECT, THE NGO AIMING TO EMPOWER GIRLS TO CHANGE THEIR LIVES, **FARAH RAMZAN GOLANT**'S ROLE HAS CHANGED CONSIDERABLY SINCE HER CREATIVE MEDIA DAYS. SHE TALKS TO *JANE BAINBRIDGE* ABOUT MAKING AN IMPACT

Why did you decide to move from the creative/media industry to this role?
In CEO roles at AMV BBDO and All3Media, I had embraced disruption and innovation to challenge the status quo. I had overseen the $1bn private equity sale of All3Media and was open to a new challenge: to build something of lasting value to the world. When the Nike Foundation and its co-chair, Maria Eitel, approached me to become CEO of Girl Effect, I was drawn to the real potential to use my skills in a new sector. It was a once-in-a-lifetime chance to build true return on impact.

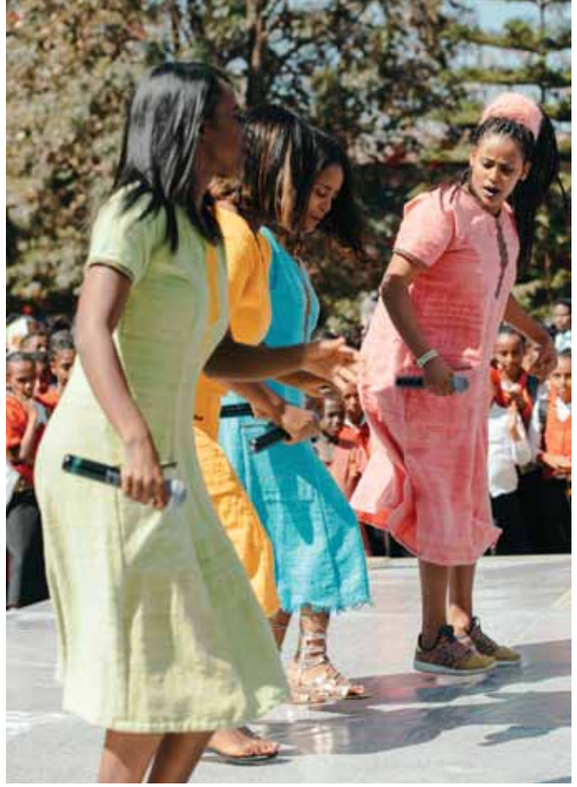
In what ways is development like the creative/media world and how is it different?
While the private and development sectors both recognise the power of behaviour and social-norm change, the former is built around the power of the consumer, while development still speaks to the needs of beneficiaries. In its most simplistic form, it is a 'pull' or a 'push' of services.

What has surprised you most in this role?
After working with global brands, I thought the international development sector may be slower and more risk-averse – but I've learned more about disruption to negative beliefs and social norms than at any other point in my career. I have been surprised, however, by the unrealised potential of private sector and international development partnerships – beyond conventional CSR initiatives – to create change at scale. Girl Effect partners with organisations such as Omnicom and Facebook, which amplify and enhance our work through in-kind investment, allowing us to tap into their expertise and infrastructure. Girls Connect is one example. Launched in Northern Nigeria with iSON Group, one of Africa's largest IT companies, this digital platform delivers a personalised experience for girls – a place where they can access on-demand content and conversations with role models from iSON's call centre, via mobile. We're seeing extraordinary early results – both in the lives of the girls who call in to Girls Connect and the role models themselves.

You rationalised the Girl Effect portfolio when you took over – what was your strategy and how did it shift the focus?
I spent the early months listening and learning from our teams in London, Rwanda, Nigeria and Ethiopia – with our partners, our board of trustees – and immersing myself in the reality of adolescent girls. It meant I could apply my fresh eyes, business experience and strategic view to the Girl Effect portfolio, shifting focus from global advocacy and awareness building to changing perceptions of girls on the ground, using youth brands and mobile platforms. I also invested in new people and capabilities – from data scientists and evidence specialists to content makers and academic collaborators.

How have you introduced evidence-based decision-making and assessment?
Everything we do is about impact for girls, so robust evidence and assessment is essential for proving the efficacy of our work, as well as for improving our programmes. The concepts and designs of our youth brands and mobile platforms are based on deep insights, revealed by our own research and large-scale digital data sets. At every stage, girls take part – as designers, field researchers and data collectors – so our insights are unfiltered and authentic, as well as actionable.

We developed a Theory of Change framework that sets out how we evaluate change for cross-cutting issues (voice, value and connections), as well as specific thematic issues, such as health, education, safety and economic opportunity. We evaluate ourselves by the tangible impact we have on a girl's life, her relationships, and her ability to make choices and create paths for change.



How have you best used mobile technology?
We start by understanding girls' lives and the challenges they face, then designing mobile platforms to help them overcome these so they can create positive changes in their lives. We currently have three examples of how mobile technology can be a game-changer: Girls Connect, TEGA and Springster. We created TEGA to address a significant data gap on girls. Conventional research methods in hard-to-reach communities can have serious limitations – they can be slow, expensive and inaccurate. Often, girls won't be honest answering questions asked by adult outsiders – if they are given the chance to answer at all. By employing and training girls to use bespoke smartphones and gather insights from members of their community, through surveys, photos and videos, TEGA can uncover powerful data in real time, in robust sample sizes. So organisations can understand the reality of girls' lives, resulting in better designed, more targeted programmes. TEGA is now operating in communities in Nigeria, Malawi, Rwanda, India and the US. Our global digital brand, Springster, uses mobile to connect marginalised and vulnerable girls around the world. Featuring content designed for and created by girls, the platform puts essential, tailored information directly into their hands. Springster is now live in 66 countries and has reached 15m unique users in the past year.

Why was there a need for TEGA in a developed country such as the US?
We adapted and piloted the programme in Saginaw, Michigan, where violent crime is 3.5 times higher than the national average, and a woman is four times more likely to be a victim of rape. Forbes labelled Saginaw as the most dangerous city in America to be a woman, but there was little to no research revealing the cause, extent and impact of violence on the community – and, in particular, on women and girls. We recruited 16 girls from vulnerable or marginalised backgrounds in Saginaw and trained them to become TEGA mobile researchers. The data is providing invaluable insights for local community groups such as Saginaw Community Foundation, which has now prioritised education as one of the biggest concerns of Saginaw's youth. Other youth programmes – such as HIRE, Men of Excellence and Youth MOVE – have also looked to expand their services after collaborating with the TEGA initiative.

Why should brands work with Girl Effect?
Not just brands! At Girl Effect, we're always looking for partners who are committed to creating positive change for girls – people who can fund us, partner with us, or share their expertise and resources. We believe the most effective way to create change is to collaborate with like-minded people. The work we do is supported and funded by a wide range of people and organisations, such as Gavi, the vaccine alliance, PEPFAR and the Bill & Melinda Gates Foundation.

Female empowerment is currently front of mind; do you see equal pay and campaigns such as #MeToo as allied, or the preserve of the affluent while you're fighting a poverty-focused agenda?
What movements like #MeToo and #TimesUp have shown, is that gender discrimination affects all women and girls. A letter published by Alianza Nacional de Campesinas, the US farmworkers women's organisation, in support of #TimesUp showed that women from farming communities, who are far from 'affluent', can powerfully raise their voices in support of one another. In the countries where we work, these inequalities are exacerbated by poverty and entrenched social norms, which make our work even more important. I'm encouraged to see so many women and girl empowerment movements thrive, because they are all driving towards a shared end goal we all strongly believe in.

BUSINESS - FOCUS

DEALING WITH UNCERTAINTY

THE FUTURE FOR BRANDS AND BUSINESSES CAN SOMETIMES BE UNCLEAR, WHETHER BECAUSE OF INTERNAL OR EXTERNAL FACTORS, BUT THERE ARE FOUR STRATEGIES COMPANIES CAN ADOPT TO HELP THEM PULL THROUGH. BY **ANDY DAVIDSON**

When you gamble on the throw of a dice, you do so with the awareness of the likelihood of winning, based on your knowledge of recurring themes and patterns of outcomes. Imagine, then, that you throw the dice and it sheds its spots, or disappears. That's the difference between risk and uncertainty: risk is tied to events that can be predicted within the framework of probability; uncertainty involves surprises and unknowns with no measurable probability.

Uncertainty is an uncomfortable feeling, and it's widespread: from our environment and political structures, to our economy, social structures, health and identity – all are in a state of upheaval.

There are circumstances in which uncertainty can be positive. For example, when watching a film or reading a book, we don't want to know how a story will end, and the anticipation of finding out is crucial to our enjoyment. The uncertainty is temporary and finite, however; we know the parameters in which the uncertainty exists.

"You need a predictable environment to explore and take risks," says Dr Guido Orgs, a cognitive neuroscientist at Goldsmiths, University of London. "We are interested in novelty as long as we are in a safe environment."

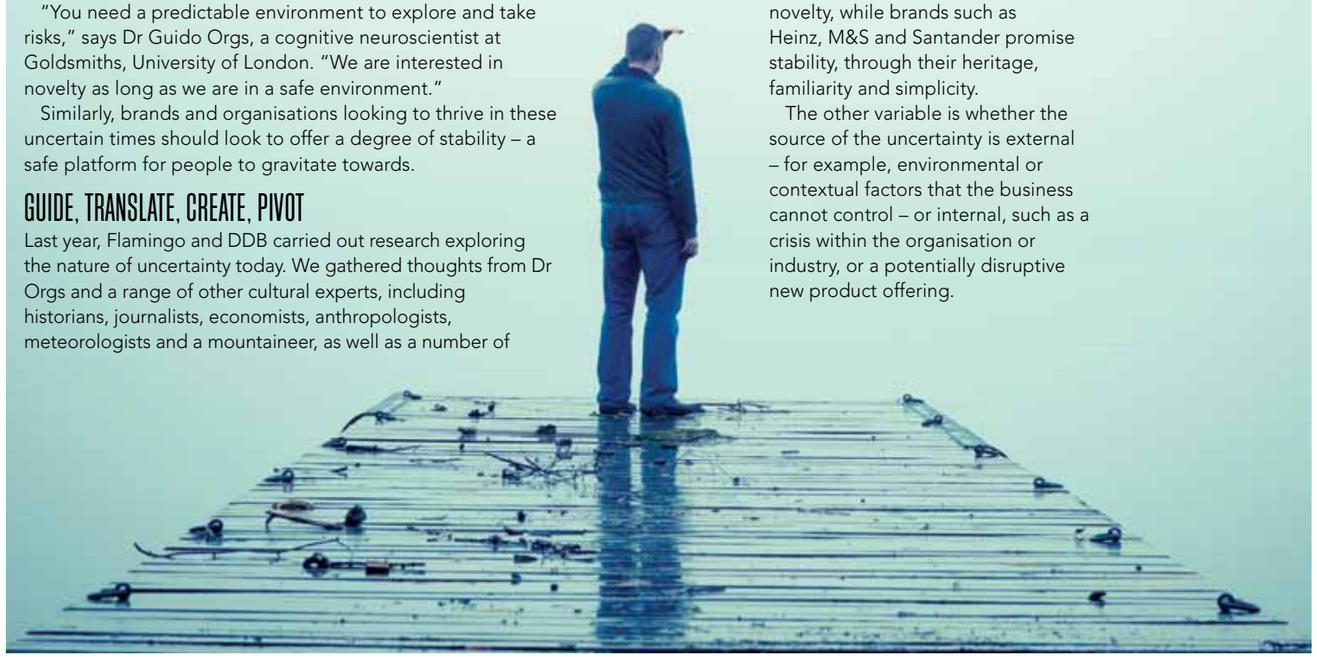
Similarly, brands and organisations looking to thrive in these uncertain times should look to offer a degree of stability – a safe platform for people to gravitate towards.

GUIDE, TRANSLATE, CREATE, PIVOT

Last year, Flamingo and DDB carried out research exploring the nature of uncertainty today. We gathered thoughts from Dr Orgs and a range of other cultural experts, including historians, journalists, economists, anthropologists, meteorologists and a mountaineer, as well as a number of C-suite business leaders. From these discussions, 12 key themes for dealing with uncertainty emerged. These were then distilled into a model describing four overarching strategies to help brands and businesses navigate times of uncertainty.

Establishing the most appropriate strategy relies on assessing an organisation against two variables. The first is the nature of its values – more specifically, whether it promises change or stability. Tesla and Apple are brands that promise change by offering difference, adventure and novelty, while brands such as Heinz, M&S and Santander promise stability, through their heritage, familiarity and simplicity.

The other variable is whether the source of the uncertainty is external – for example, environmental or contextual factors that the business cannot control – or internal, such as a crisis within the organisation or industry, or a potentially disruptive new product offering.



1. Guide

When a brand's values promise stability, and its source of uncertainty is internal, the 'guide' strategy – centred on careful listening, rather than dictating – is needed. It describes an approach where a brand stabilises itself through a deep understanding of the issue, followed by reframing and reassuring its customers.

In 1995, when the BSE crisis took hold in the UK, sales of minced beef dropped by 50% almost overnight. Damning media reports and conflicting public voices left the UK public uncertain, despite the fact that not all UK beef supplies had been contaminated, and the low number of deaths that had been linked to the disease had not been scientifically proven.

The Meat and Livestock Commission (MLC) resisted making any formal announcement or formulating a recovery strategy until it had uncovered exactly what was on consumers' minds. It did this by conducting four focus groups a week, for six weeks, and uncovered a crucial insight: people assumed that minced beef contained offal, and had attributed this to the spread of BSE.

The MLC was able to create a successful communications strategy to reassure people that its product didn't contain offal, and so was safe to eat. Slowly but surely, sales of minced beef edged back to normality.

2. Translate

According to the cognitive bias known as the positivity effect, the more we see or use something, the more we come to like it. This applies to receiving the same experience from a product or service and, in times of uncertainty, this consistency feels even more crucial. While maintaining consistent values, themes and threads is vital, there must be movement and evolution in line with customers' needs. The key to this approach is to stabilise by doing the same thing in a different way.

For example, McDonald's – which has built its brand on consistency – has recently evolved its offer to include digital ordering systems and table service. It has adopted the 'translate' strategy, which is best for brands that promise stability but whose uncertainty comes from external factors – in this case, changing notions of convenience.

"Ease of use and convenience are part of McDonald's DNA," says Silvia Lagnado, the company's global chief marketing officer. "But technology is changing what convenience means, and we have to keep up."

3. Pivot

Pivoting is about keeping one foot firmly in place while shifting in the other direction. It is the best strategy when a brand promises change and the source of its uncertainty is internal. This usually describes a brand that is looking to disrupt the industry with a new product or offering.

A great example is Netflix, which has successfully – and rapidly – transitioned from being an aggregator of content to a producer of content.

When it started out, many predicted that Netflix's ad-free model would limit its lifespan. Now, however, most of its revenue comes from original content, much of which is informed and shaped by the vast amounts of data the company holds on its customers' preferences.

In the four-year period between 2012 and 2016, Netflix's production of original content rose by a staggering 3,050%, going from four to 126 shows. It now has more original content than any other network or cable channel, and its proportionately lower spend on licensing fees has had a positive effect on its profit margins.

4. Create

When the context is uncertain and your brand promises change – a kind of 'double uncertainty' – action beats prediction. Having a sense of direction, even if it's in an unprecedented direction, is vital to creating stability. Tesla is a perfect example of a business that is all about disruption, but its unwavering focus on a defined goal offers reassurance.

It's easy to become paralysed by uncertainty, and to obsess about trying to model and measure the future. A more valuable approach is for brands and organisations to realise their potential to shape the future, and to use times of change to create the culture – and uphold the values – that they want to see flourish amid the uncertainty.

As Macedonian journalist Zvezdan Georgievski, one of the cultural experts spoken to for the research, says: "Uncertainty makes you think; it brings the best out of you. Ideas come out of uncertainty; new ideas are exciting since they can be a new beginning and a hope that things will get better." ■

Andy Davidson is chief strategy officer at Flamingo

BEHAVIOURAL SCIENCE MYTH BUSTING

RICHARD SHOTTON CHALLENGES COMMON OBJECTIONS TO BEHAVIOURAL SCIENCE IN THE BUSINESS WORLD

"If you're a planner and you don't employ behavioural science in your day job, then you're a bloody idiot. It would be like being a pilot and forgetting to use your eyes." So said Kevin Chesters, CSO Ogilvy & Mather. It is a bold statement, but behavioural science is more than relevant: it's robust and has identified a breadth of biases. So whatever a client's communication challenge, there's a relevant bias that can help you solve it.

There are three common objections to behavioural science:

Myth 1: It doesn't work

The main reason behavioural science is rejected is that people claim not to be influenced by small nudges. This can be seen in a follow-up to perhaps the most famous experiment in behavioural science.

In the original test, Robert Cialdini investigated what messages would be most effective in persuading hotel guests to re-use their towels. His first message simply stated the environmental benefits, and persuaded 35% to re-use their towels. The second stated that most people re-used their towels, and this boosted uptake to 44%. This suggests people copy others – known as social proof. In the follow-up test however, Cialdini asked people to predict how they would behave. Overwhelmingly, they claimed they'd be more influenced by the environmental message than the social-proof one – the opposite of what happened. It's not that the participants were lying – more that they were unaware of their motivations. If we ask people directly, we receive plausible, but misleading answers. Consider the approach Rebecca Strong and I took when quantifying the impact of labelling washing-machine tablets as 'ecologically friendly'. We sent a group of consumers the same type of washing-machine tablet. Half the group was told they were testing a standard supermarket tablet, the other half a green variant. They washed a load of clothes and reported back on the tablet's performance. On every monitored metric, consumers preferred the non-green tablet.

The experiment unearthed consumers' genuine reservations and misconceptions about green goods. Compare this to direct questioning, when shoppers often claim a deep and positive interest in environmental goods.

Myth 2: It's just ad tweaking

The second objection to behavioural science is that it might improve performance marginally, but too little to be worth all this fuss. A punchy criticism, but not true. The most successful ad campaign of all time has a behavioural bias at its heart.

When De Beers began advertising widely in the 1930s, there was no heritage of buying diamond engagement rings: sapphires and rubies were just as popular. However, De Beers forged a link between a diamond's durability and the enduring nature of true love, as captured by Frances Gerety's strapline, 'A diamond is forever'.

Once De Beers had persuaded romantics that a diamond was the ideal token of love, it still had to convince them to part with a small fortune. So it embedded the idea that nothing less than a month's salary would do. It worked because of the psychological principle 'anchoring' – the idea that, if you communicate a number at the start of a process, it influences the listener. Psychologists Kahneman and Tversky, who discovered the bias, believed anchoring works because listeners inadvertently use any arbitrary number as a starting point for their deliberations – and, in situations of uncertainty, don't adjust enough away from the anchor. So ring buyers recognised that a month's salary was too much, but it served as a starting place and they didn't adjust down enough. The results were staggering – De Beers' US diamond sales rose from $23m in 1939 to $2.1bn in 1979, a 19-fold increase.

Myth 3: It's little more than common sense

Consider the bias discovered in a 1966 experiment by Harvard University psychologist Elliot Aronson. He recorded an actor, armed with the right responses, answering 92% of the questions in a quiz correctly. Afterwards, the actor pretends to spill coffee over himself (a small blunder, or 'pratfall'). The recording was played to students, half of whom saw the version with the coffee spill, and the other half who saw the one without. They were then all asked how likeable the contestant was. The students found the clumsy contestant more likeable. Aronson called the preference for those who exhibit a flaw the 'pratfall effect'. It's hardly an obvious insight, but it has been profitably harnessed by brands as diverse as VW ('Ugly is only skin deep'), Stella Artois ('Reassuringly expensive') and Avis ('We try harder'). ■

Richard Shotton is deputy head of evidence at Manning Gottlieb OMD and author of the book *The Choice Factory*, published by Harriman House.

The final furlong?

Legendary investor Sir John Templeton observed that bull markets experience four phases: pessimism, scepticism, optimism and euphoria. He posited that markets are born on pessimism, grow on scepticism, mature on optimism and die on euphoria. Put less politely by Barton Biggs, Morgan Stanley's erstwhile strategist: "A bull market is like sex. It feels best just before it ends."

More recently, Howard Marks, of Oaktree Capital, identified just three stages of a bull market: when a few forward-looking people begin to believe things will get better; when most investors realise improvement is under way; and when everyone's sure things will get better forever.

So how do we know when the market has peaked? A list of my favourite indicators is currently flashing amber and suggests we might be at the final stage of the bull market.

First, advertising is the so-called canary in the mine shaft, as companies can cut ad spend quickly and easily without incurring additional costs – unlike when reducing the workforce or closing factories. WPP, the world's largest ad group – and a bellwether for the marketing services sector – warned three times last year that revenues were slowing.

Second, stretched balance sheets are another indicator, as years of recovery and growth give management teams confidence for risk taking. It is especially relevant in this cycle because 'free money' – the lowest interest rates in history, compounded by quantitative easing and easy credit – has encouraged companies to grow by acquisition using cheap debt rather than equity. Services firm Carillion is the first zombie company to collapse under the weight of its debt pile.

Third, an unprecedented ninth year of expansion in the US economy means the 'animal spirits' are stirring. Mergers and acquisitions have gathered momentum; BroadCom's $142bn bid for Qualcomm was to be the largest tech deal in history until President Trump halted it on "national security grounds". He also halted the recent planned merger of AT&T with Time Warner, which is now being contested in court.

"We should put our faith in people with something to lose"

Fourth, the coffers of the private equity players are overflowing towards the top of the cycle and they are taking ever bigger bets. The latest example is Blackstone leveraging eight-fold to acquire a 55% stake in Thomson Reuters' Financial & Risk unit for $17bn. The majority sellers are the Thomson family, just as the Murdoch family are sellers of 21st Century Fox to Walt Disney, not to mention Richard Desmond's sale of the *Express* titles to Trinity Mirror, now renamed Reach. It is interesting that those with 'skin in the game' are sellers and, as Nassim Nicholas Taleb says in his latest tome, *Skin in the Game: Hidden Asymmetries in Daily Life*, we should always put our faith in people with something to lose.

Fifth, unique pieces of art play a high-profile role at the top of the market, as they are seen as a safe haven and a store of value. Companies can issue equity like confetti – in the same way as central banks have been printing money since the global financial crisis – but Da Vinci and Van Gogh can't pick up their paint brushes again. So just as the $82.5m sale of Van Gogh's *Portrait of Dr Gachet* marked the peak in May 1990, it could be the $450.3m sale of Da Vinci's *Salvator Mundi* in November 2017 this time.

Sixth, there is always a craze at the top of the market, from Dutch tulip mania to the dotcom boom to Bitcoin/crypto-currency madness.

It is impossible to know exactly when a market cycle will end, because the pendulum can swing too far in either direction. Markets are emotionally driven; remember Alan Greenspan, chairman of the Federal Reserve, warned of "irrational exuberance" as early as 1996, when the dotcom boom was still in its infancy.

Nasdaq did not peak until March 2000 and finally cracked in September 2001 with 9/11. Similarly, the Dow Jones peaked in October 2007, but only crashed and burned in September 2008 with the collapse of Lehman Brothers and the onset of the global financial crisis. The peak was marked in the UK by simultaneous events in April 2007 – the bid by RBS for ABN Amro; the warning of a slowdown in US classified revenues; and the leveraged £10bn buyout of Alliance Boots by KKR, the largest MBO recorded, which marked the top of the credit cycle.

Enjoy the ride while it lasts.

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

TECHNOLOGY - FOCUS

BLENDING IN

FROM TVs THAT LOOK LIKE WALL ART TO VOICE ASSISTANTS, TECHNOLOGY IS GROWING LESS VISIBLE, YET IS STILL ALL AROUND US. **KATIE MCQUATER** EXPLORES THE FUTURE OF TECH THAT DISAPPEARS

We are living in an age of distraction, with evidence mounting that our constant connection to technology is reframing our behaviours and could be detrimental to our mental health and relationships.

A 2014 experiment by the University of Virginia and Harvard University found that participants would rather give themselves a small electric shock than be alone with their own thoughts for 15 minutes, indicating how intrinsic smartphones have become to our daily lives. A paper published by American psychologist Jean Twenge in 2017 suggests a link between teen depression and smartphone use. Even those who helped build the tech behemoths have launched a campaign – the Center for Humane Technology – to call time on Facebook, Google *et al*'s war for people's attention.

This awareness of the need to disconnect is driving a lifestyle trend towards minimalism and simplicity. A new book – *How To Break Up With Your Phone* – urges readers to ditch their smartphones to regain agency in their lives, and whole industries have sprung up around digital detoxes and mindfulness apps. Even Generation Z, which grew up surrounded by technology, may not be as evangelical about it as expected. Recent research by BuzzBack suggests young people are seeking balance in their lives and want to disconnect from technology. As one study respondent said: "We don't want more tech – we want better tech."

"We're all aware something is 'off', and that we want something more," says Linda Stone, a former technology executive who coined the term 'continuous partial attention' in 1998. "Those who can connect with their values and sync with what 'more' means to them are most able to pursue those things. In many cases, that involves disconnecting from technology and connecting more to family, to nature and so forth.

"At the same time," she adds, "there's a tension between wanting to improve our quality of life by connecting to life beyond technology and our fascination with technology and all that it seems to offer us. When we don't know what we want to move toward, the technology winds up having a strong hold on us."

Amid this push and pull, some tech companies are taking a different approach to design, by developing products that 'disappear' when not in use or that integrate with people's lives, blending into our surroundings in a more fluid way.

"Tech designers are acknowledging that homes are important spaces where people want to unwind and relax – to escape or roll back their digital connection," explains Laura Dennehy, head of content solutions at Foresight Factory. "We now see technology – and its associated wiring, buttons and screens – as clutter, both visually and mentally."

Samsung, for instance, has built Frame TV, which is designed to look like a piece of art when not in use, while the Speakarts wireless speaker, produced by Curbed in Denmark, can be customised with various art-canvas covers. Ikea has created furniture with wireless charging concealed within it, while a new Panasonic TV screen becomes a transparent pane of glass when it is turned off.

But it's not about technology disappearing altogether. Dennehy says the desire for disconnection is driven by 'notification nausea': "We want our connectivity to be casual, not interruptive – to aid our lives rather than distract. Devices may be ever-present, but not always craving their user's attention."

The rise of voice, driven by the popularity of devices such as Amazon's Alexa, is already starting to change people's relationship with technology, and will have an impact on the trend of 'invisible tech', according to Dennehy. "Voice will drive the need for quieter presence of tech in our lives. Consumers will demand tech that answers when needed but, otherwise, remains silent."

Users of voice technology interact with it differently. By removing the necessity for typing commands, it frees people from navigating app interfaces. People don't need to stop what they're doing to use voice – it lends itself to activities that require concentration, such as cooking.

Jamie Allsopp, managing director at Sparkler, which has done research on voice technology, says: "Voice technology represents a step change on the 'invisibility' front. It offers the promise of escape – giving back our time and attention to focus on what's important in our lives; the chance to declutter our homes and minds, but still with infinite access to whatever we want."

According to Allsopp, however, voice isn't a salve for people's fascination for screens. While the technology is 'hidden' beneath the surface, users still need visual and physical anchors to tell them there is something listening and happening.

"Somewhat ironically, for voice technology to be further adopted it will need to be more observable – people need to see others using it. And like screens, sound is an extremely good way of getting, and interrupting, attention."

Allsopp believes it will become a supplement to screen-based activities rather than replacing them. "It might shift some attention away from screens – where it offers an easier, faster and more natural experience – but mostly to other forms of digital interaction."

There has been an explosion in the development of 'connected home' or 'smart home' products in the past few years, but there's a fine balance between technology that adds to our lives and technology that adds too much, becoming a distraction.

Calm technology, a concept introduced in the mid-1990s by Xerox Parc researchers Mark Weiser and John Seely Brown, is the principle of technology that frees people to live their lives better, as opposed to plundering attention – and could be an antidote to this interruption.

Amber Case, anthropologist and author of *Calm Technology: Design for the Next Generation of Devices*, has said a lot of technology works by using just our visual sense, but that it could be much more ambient and make use of peripheral senses, interacting with us in a calmer way.

Speaking at the Thinking Digital Conference (TDC) Manchester in October 2016, Case said technology should inform us without having to talk to us. She cited a Hue Lightbulb that she has in her kitchen; it is connected to a weather application programme interface (API) and changes colour based on the weather – essentially, the technology communicates without speaking.

"Calm technology is boring," Case said. "It's like the electricity in your house – it's there when you need it and, if it goes away, you really notice. It allows you to accomplish your goals with the least amount of mental cost – the scarcest resource right now. A person's primary task shouldn't be computing – it should be being human." ■

VIRTUAL BEHAVIOUR

THE MASS MARKET TIPPING POINT FOR VIRTUAL REALITY MAY BE SEVERAL YEARS AWAY, BUT TECHNOLOGICAL ADVANCEMENTS FROM ISOBAR IN CONJUNCTION WITH MIT MEDIA LAB MEAN USER EXPERIENCES CAN NOW BE MORE ACCURATELY MEASURED. BY **JANE BAINBRIDGE**

It's immersive, intense and all-consuming – the emotional impact of virtual reality (VR) is evident to anyone who's put on a headset. But for brands to see this technology as anything more than the latest gimmick, a more scientifically replicable emotion-measurement technique is required. This is exactly what Dave Meeker, vice-president of digital marketing agency Isobar US, has been working on with a team of collaborators at MIT Media Lab.

Isobar's owner, Dentsu Aegis, has been a consortium member of Media Lab for more than six years, so a history of collaboration between the two was established. But the need for this kind of robust measurement was driven by clients. "The question of how you measure VR continued to surface, and without being able to quantify the experience, why would brands invest in it?" asks Meeker. "We know that there's a payback, purely from the visceral reaction you get when users step inside these worlds, but there was no hard science behind the measurement."

Different teams at Media Lab were working on different aspects of virtual and mixed reality. This overlapped with what Isobar was trying to determine in tracking users to understand their behaviour, as well as having multiple users in the virtual space together.

Meeker's team worked with Pattie Maes and Scott Greenwald of the Fluid Interfaces Group, MIT Media Lab, to integrate their tracking code around behaviour with Isobar's neuroscience and measurement using biometrics.

Isobar already had its proprietary tool, MindSight, to access the emotional brain in real-life environments, which could be incorporated with this work.

It then integrated this with iMotion's biometric research platform, measuring human emotional response to visual stimuli with biometric triggers such as eye-tracking, electroencephalography (EEG), galvanic skin response (GSR), electrocardiography (ECG) and facial electromyography (EMG).

A wrist sensor was used to measure heart rate and GSR, and all the sensor data was taken and processed with algorithms.

"We take the biometrics in real time on every frame of the VR experience – they run at between 60-90 frames a second. We know what you're looking at, what our biometric data says, what you're interacting with. We can see if users pick up objects, how fast they move from space to space, how they are navigating, what they're interested in and what they're not interested in," says Meeker.

"What's most fascinating, and what we haven't achieved yet in full, is taking all the data we're capturing – demographic, behavioural and biometric data – giving that back to the team in MIT Lab, and so they try and gain insight from it. Could we take how you're responding to content and tune it so it's most meaningful to you individually? It's about applying machine learning to that data set to drive the VR experience," he says.

"We found VR is a very strong tool to create empathy and to really do some of the things we want as storytellers."

Meeker says, initially, they were trying to measure VR in a similar way to measuring web experiences of mobile apps. "The biggest challenge of measuring VR was that with traditional approaches – such as copy testing or talking through user scenarios – the sheer act of participating in the process creates bias; you know you're being watched and tested, or you're talking out loud so it removes you from the immersion, which skews the results."

With this, users – although they know they're being tested – have no idea what the researchers are looking for in their responses.

"We also do facial coding," says Meeker, "but it's really hard to do with a mask on your face, so we're looking at new types of sensors that would sit inside a headset mask. The Media Lab is working on getting a more accurate read of your facial expressions and some additional data points."

Meeker is in no doubt that, if the costs come down, uptake will grow. "People take off their VR headset and they have a look in their eyes that says they have just returned from somewhere else."

View from Silicon Valley

You can't spend more than a few weeks in the Bay Area of San Francisco without hearing the phrase 'mental model' being thrown around. You'll find countless articles on LinkedIn and in the tech press telling you how to retrain your brain to adopt some new, mysterious, mental models for everything from AI to Inbox Zero.

If you unbundle the jargon, however, they're actually easy and useful. They are simply ideas of how particular concepts or systems work. For example, supply and demand would be a mental model for explaining how economies work. Similarly, the theory of a distributed ledger will help you understand how cryptocurrencies work.

Of course, even Stephen Hawking failed to discover a 'theory of everything', so there's never just one model that will work. The idea is that, by learning a few of these individual models – and stitching them together – you can understand better how an industry really works.

Now, a confession. I've become mildly obsessed with one such model from the world of product management and how it applies to research. In 2006, the academic Clayton Christensen published a now-famous paper on his 'Jobs To Be Done' framework. Twelve years later, it remains a popular and effective mental model for product managers and marketers across Silicon Valley.

The framework has a simple premise: consumers don't just buy products – they hire products to do a job and they fire them if/when they don't meet that need. By focusing on understanding the job that you/your product is *really* being hired to do, you can more effectively meet your customers' needs. There's an old quote from Theodore Levitt, the marketing professor, that epitomises this way of thinking: "People don't want to buy a quarter-inch drill. They want a quarter-inch hole."

"There's never just one model that will work"

Thinking, realistically, through all the different jobs that a research team is truly 'hired' to do has helped us to be a better partner to our stakeholders and improved the way we work with our various agencies. It's also made me think a lot about past projects and clients, and what I might have done differently if I had dug deeper into what job that project was truly being hired to do.

Start by making a list of all the possible jobs for which you or your team/agency are being hired. If you can get (honest) feedback from your clients or stakeholders, great, but you can also do this yourself. Write all these possible jobs down in a series of statements with the same structure. A verb, the object of the sentence, and a context. So, for a research team, a job statement might be: *Measure | the number of people who prefer our product over our competitor | so the CMO can make a decision on what to advertise in Q4.* However, another job statement might be: *Provide | a number | so my stakeholder can show their boss they have done some research.*

How many times have you been told that a research project has the first job statement as the objective, only to suspect that it might really be the second? How many times have you felt that your client didn't care whether the number on the slide was 60% or 80% – just that it was big enough? I'm going to bet it's more than once.

Now think about which other products, teams or agencies might be hired to do each of these jobs – then think about why you might be fired for one of these competitors instead.

You can then start working through how you could differentiate yourself from these competitors to make sure you are hired consistently for that job. You might find you are suddenly considering entirely new competitors and ideas.

Being realistic – even brutally honest – about what your team or agency is being hired to do can open up opportunities, build a more differentiated offering and, ultimately, help us all better meet our end customers' needs.

Hopefully, along the way, you can also avoid research spend being wasted or misused. Give it a try and let me know on Twitter how you get on.

Matt Taylor is consumer insight lead at Twitter

IDENTIFYING CROWDFUNDING SUCCESS

A SCIENTIFIC STUDY INTO BRAIN ACTIVITY CAN NOW HELP PREDICT THE SUCCESS OF CROWDFUNDING PROJECTS. *JANE BAINBRIDGE* TALKS TO THE STUDY'S LEAD SCIENTIST, **ALEXANDER GENEVSKY**

Raising finance for a project by asking a large number of people to donate a small amount of money has taken off in the past few years. This form of fundraising, which started in 2012, turned the traditional model of asking a few people for large sums of money on its head and became possible because the internet and social media give a reach that would have been impossible in the pre-internet age.

The projects that are crowdfunded – be it kick-starting a new business or getting a one-off project off the ground – are varied, but knowing which ones will be taken up by the crowd has been challenging.

Alexander Genevsky, of Rotterdam School of Management, Erasmus University, and a team of researchers scanned brain activity to see if they could make more accurate predictions of individual choices. The study also showed that activity in one area of the brain could better predict the success of crowdfunded projects than survey or poll answers. In the experiment, the researchers showed 30 people 36 real crowdfunding pitches for documentary films on the Kickstarter website.

What made you embark on this research?
To date, the majority of work involving the brain and decision-making has focused on predicting individual decisions – that is, using brain activity during a choice or while considering the options to predict the outcome of that decision. We became interested in how individual choice may scale to aggregate choice. How does one person's decision to fund a project translate to a group funding the project on the internet? While some theories assume that individual choice simply sums to group choice, it may be that some components of choice generalise more widely than others.

What parts of the brain are most connected with engaging in crowdfunding and why?
We found that activity in regions associated with positive affect – that is, the nucleus accumbens – and with balancing benefits and costs (the medial prefrontal cortex) predicted an individual's choices to fund. Even more importantly, however, only activity in the region associated with positive affect forecast if a project would be successful weeks or months later on the actual crowdfunding website. In fact, this neural activity was more accurate in forecasting crowdfunding success than the answers that people gave in their surveys. This suggests the initial positive emotional response to a request may drive eventual decisions, regardless of other, more deliberative, concerns.

Was your sample big enough to be valid?
While the total number of subjects used in most neuroimaging is not very large, because of cost constraints, we are able to gain a significant amount of statistical power from the repeated-measures experimental designs. Each participant makes many choices, so we can collect many data observations. It allows us to draw conclusions more confidently from fewer participants.

Did you use real-life Kickstarter campaigns?
We used real-life Kickstarter campaigns that had been uploaded just before the study began. As a result, we didn't know the final outcomes for these projects until well after data collection had been completed – which is a strength of the study.

Can you explain in more detail how the activity in the nucleus accumbens during the decision task predicted project success?
Using functional magnetic resonance imaging (fMRI), we measure the neural activity in the nucleus accumbens while our participants, in the scanner, are viewing the crowdfunding proposals. We then compare the activity in this region for projects that were eventually funded on the Kickstarter website with those that were not. Projects that were successful in eliciting funding were associated with greater levels of activity in the nucleus accumbens in our lab participants in the scanner.

What is specific about this part of the brain and its function?
The nucleus accumbens (NAcc) is a core, evolutionarily conserved region located deep in the centre of the brain. It is thought of as a centre of positive, goal-directed behaviour, and is associated with positive affect and reward. Its location, away from the surface of the brain, is why fMRI is a particularly useful tool in this case.

In previous work, two areas of the brain are often implicated in predicting individual decisions – the medial prefrontal cortex and the nucleus accumbens. In our study, when we focus on predicting our participants' own choices, we find a similar result, with both of these neural regions predicting choices. However, when we scale our analyses to the aggregate level – to explore which brain regions predict the real-world outcomes – we find that only the nucleus accumbens remains important. In this case, the medial prefrontal cortex does not add any additional information.

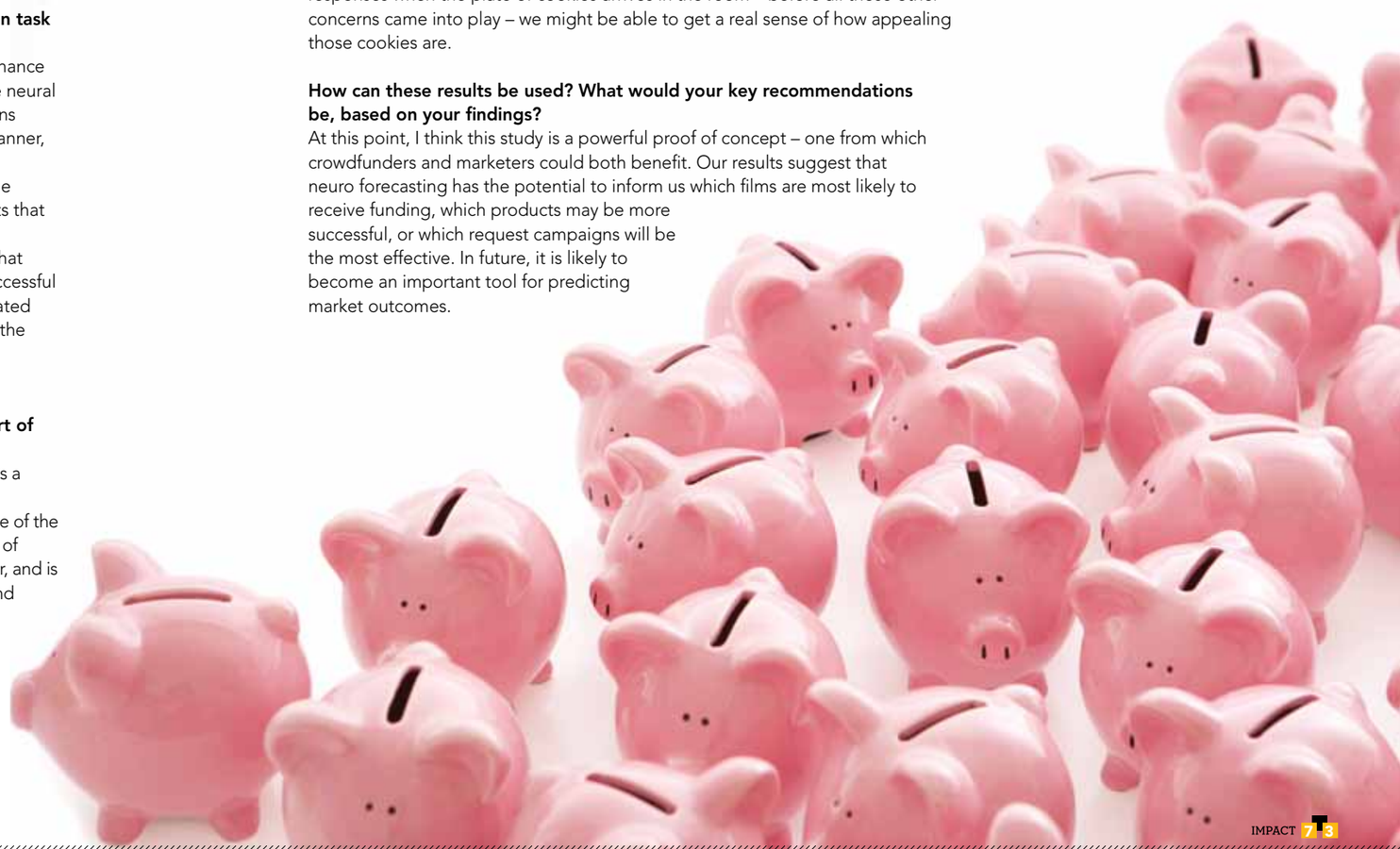
Your findings suggest there is a universality to what makes for successful crowdfunding – how can individual preference not be a factor?
This is an excellent question and one we continue to pursue. While affective and integrative components might support individual choice, affective components may generalise more broadly across individuals. In other words, our basic emotional response to a choice may be more universally shared across people, and so represent an index of the overall appeal of an option. On the other hand, what makes us individual and leads to our idiosyncratic preferences and behaviour may be very important in keeping us internally consistent, but might be a weaker measure of the more general appeal of an option.

An example I often like to use is that of warm chocolate cookies. If I were to bring a plate of warm cookies into a room, everyone might want one, but they will think twice before actually taking one. They might decide to pass, for instance, if they remember that they are trying to lose weight, or if they are going out to dinner and don't want to spoil their appetite. But if we could measure their first neural responses when the plate of cookies arrives in the room – before all those other concerns came into play – we might be able to get a real sense of how appealing those cookies are.

How can these results be used? What would your key recommendations be, based on your findings?
At this point, I think this study is a powerful proof of concept – one from which crowdfunders and marketers could both benefit. Our results suggest that neuro forecasting has the potential to inform us which films are most likely to receive funding, which products may be more successful, or which request campaigns will be the most effective. In future, it is likely to become an important tool for predicting market outcomes.

Why is this better than doing market research to find out why people have invested?
I wouldn't suggest we do away with surveys, focus groups and other traditional methods of marketing research. However, I think we are approaching a time when biologically based and neural measurements will play a significant role in mainstream marketing. Additionally, we hope this work leads to deeper insights into the complex mental and emotional process that goes into the real-world choices we make.

Alexander Genevsky, Carolyn Yoon and Brian Knutson, *Journal of Neuroscience*, 3 August 2017, 1633-16



STILTED SYNERGY

WHEN BANKS ARE IN CRISIS, CUSTOMERS HAVE BEEN KNOWN TO PANIC, LEADING TO BANK RUNS. RECENT RESEARCH EXPLORES WHETHER SUCH SELF-FULFILLING PROPHECY COULD ALSO ERODE THE COOPERATIVENESS OF EMPLOYEES DURING TIMES OF ECONOMIC DOWNTURN.
BY **KATIE MCQUATER**

The prosperity of modern economies relies on cooperation. Businesses need employees to work together and collaborate. Ultimately, people need to be able to rely on others to keep the cogs of the economy turning.

The impact of the 2008 financial crisis was felt by businesses across Europe – but could adverse economic conditions also affect the psychology of individuals when it comes to their propensity to work together within those organisations?

Research by Nina Sirola, a postdoctoral fellow at INSEAD in Singapore, has sought to answer that question and explore how organisational behaviour can be shaped by economic influences. With a focus on trying to understand the direct impact of the macro context on individual employees, Sirola conducted two field studies and two experiments, to determine whether the perception of economic downturn undermines individuals' willingness to cooperate.

Sirola's doctoral research coincided with the recession in Europe in 2008-09, which had a huge impact on her home country of Croatia. "As an economy in transition, Croatia experienced a period of strong growth leading up to the recession, and the change in the economy created a dramatic change in the psychology of the entire nation, with people moving from extreme optimism to extreme pessimism in a matter of days," she says.

EXPLOITATIVE BEHAVIOUR

Sirola began to wonder if this radical change in individual psychology would create a self-fulfilling prophecy. "We know about such responses by bank customers, called bank runs, and by investors, which is called panic selling – but I wondered whether something similar was happening among ordinary employees."

Her theory was that adverse economic conditions would lead people to think others are more likely to behave exploitatively, which, in turn, would lead to people behaving less cooperatively, in case they were taken advantage of.

In two large-scale, attitudinal field studies, Sirola first examined how macroeconomic changes shape people's perception of others' exploitativeness. Her study combined individual-level data, obtained from the World Values Survey (2015), with country-level unemployment data from the World Bank Development Indicator database (2015).

STATISTICAL MODELS

The World Values Survey measured the perception of others' exploitativeness by asking respondents whether they think most people would try to take advantage of them if they had the opportunity. Using multilevel linear regression – a statistical model of parameters that vary at more than one level – with cases nested within countries, the results of Sirola's study showed that high unemployment, gross domestic product (GDP) change and absolute GDP all had a significant effect on the perceptions of others' exploitativeness.

The second study, which tested the theory on respondents solely from the US, merged data from The General Social Survey (2017) with region-pooled unemployment data from the Bureau of Labor Statistics (2012), to assess the correlation between unemployment and people's perception of others' exploitativeness. It also strengthened Sirola's theory for the link between perceived exploitativeness and the state of the economy through unemployment, GDP change or absolute GDP.

While the field studies indicated a link, Sirola wanted to find out whether this perception altered their willingness to cooperate. To test her hypothesis, she conducted two experiments, the first among online workers and the second among employees working in US firms.

In the first study, participants were asked to read an article that purportedly described the actual economic conditions, and then take part in an investment game prototypical of situations offering potential for cooperation.

A perceived exploitativeness, measure was used to test whether it mediates the effect of economic downturn cues on cooperation. The experiment also investigated an alternative explanation – that economic conditions perceived to be weak undermine people's likeliness to cooperate, not because they expect others to be more exploitative, but because they are concerned about their own financial situation. To rule out this explanation, the study defined the expected value of both options presented to the participants ('cooperate' v-s 'do not cooperate') as the same – that is, they can both lead to gains and losses. The measure of financial concern was still included in the study and used as a control mediator.

To offer further evidence of the theory that inferred exploitativeness reduces cooperation, the study examined whether participants made investment decisions in relation to another online worker or in relation to a computer, and measured the participants' mood and general likelihood to take risks.

The fourth study sampled employees working in various US firms, using the same manipulation to prime their perception of the state of the country's economy as weak or strong. Participants were asked whether they would choose to cooperate if they were given a job offer at another company, with an initially lower, but potentially higher, salary later on. This scenario was used to recreate a situation affording an opportunity for cooperation, where there is also potential to be exploited. As in the previous study, the results found that the participants in the downturn condition perceived others to be exploitative and were less likely to cooperate.

PSYCHOLOGICAL EXPERIENCE

Relying on the manipulation of participants' perception of the state of the economy through articles ostensibly describing the current economy, but actually describing it as either in a downturn or an upturn, was a challenge for Sirola – as such a manipulation is, of course, different from a real-life experience of learning that the economy is on the brink.

"At the same time, my theory concerns the psychological experience of a worker who receives news that the economy is performing poorly, keeping the worker's personal situation constant," says Sirola. "This is precisely the situation recreated in the experiment, ensuring good psychological realism. The claim that bad economic times in themselves erode important workplace activities is theoretically and practically important, and the current set of studies provides suggestive data that the effect might exist." However, future study on the phenomenon is needed to corroborate these findings, she adds.

According to Sirola, the research suggests organisations should be proactive when it comes to managing the psychology of their workforce to avoid the erosion of productive work behaviour. "The findings illustrate that employees might respond to cues of economic downturns in a way that generates a dangerous self-fulfilling prophecy, whereby initial concerns about economic performance make employees less helpful and less collaborative, for example – possibly causing economic problems for the firm," she says.

"Greater managerial efforts to emphasise the importance of cooperative and communal relationships when interacting with employees, or adding a joint-incentive component to the department, should motivate cooperation in the workplace after cues of economic downturns.

"It is unrealistic to build models of organisational behaviour by assuming that employees act in a vacuum. By examining how economic changes shape core organisational behaviours, this work helps toward understanding individual employees in a broader economic environment."

VOICING YOUR PREFERENCES

CONCEPT TESTING HAS BEEN DONE THE SAME WAY FOR YEARS, BUT NOW GFK IS USING VOICE ANALYTICS TO GAUGE THE EMOTIONAL RESPONSE TO NEW IDEAS. BY **JANE BAINBRIDGE**

Attracting consumers to a new concept is no mean feat, especially in our highly competitive markets. Those that work appeal to people rationally and emotionally – and, while traditional concept testing has been good at identifying the rational, it was to tap into the emotional side that GfK developed MarketBuilder Voice.

Aimed at early and late-stage screening for consumer goods, it combines quant-size panels with qual insight, and uses technology combined with classification and consumer behaviour expertise.

Miriam Comber, GfK's strategic innovation director, market opportunity and innovation, says: "We were looking for something that would describe more discrimination. When going back to a client, you want to know if there is a winning option – particularly when screening ideas. You don't want fuzzy results, with three or four that all look the same.

"The problem is that what we're often asking in concept testing is how much they like something, and then whether they're going to buy it – and there isn't necessarily a correlation between the two. We always assume there is, but it's not 100%.

"We have a measure of sentiment – overall liking – and then a measure called activation that looks at whether people spontaneously say 'I'd like to buy that or try that'. You're looking for people to spontaneously say yes, rather than you suggesting it to them."

Voice, adds Comber, allows you to get to that spontaneity. The methodology involved creating classification models using 5,700 voice recordings. To get a baseline, respondents complete a voice-calibration interview online – they are asked to read a sentence and describe a room from a picture they are shown – and are then recorded while giving their views on the concepts they are shown. By combining natural speech with modelling, sentiment and activation, emotional levels generated by the concept can be identified.

"Whatever they say about the concept is our target reaction," says Comber. "There's a lot of natural language processing going on to measure different things in voice. We were homing in on one measure – passion. The voice trace goes through the model that looks at passion. Then the transcript goes through two other models – one for sentiment and one for activation [people saying they'd buy it or recommend it]. Identifiers of passion are modulation, pitch, volume and flutter. It was tested on 1,000 features and it's measured on 10-30."

Transcription is done by a person, so accents aren't a problem, but it will be automated further down the line if accuracy can be achieved.

The model was built as a collaboration between GfK Verein, its market research think tank, and the University of Passau, Germany. There have been issues to overcome with this more unfamiliar form of research, as well as with how panellists' behaviour affects the testing of the new technique.

"People are used to doing surveys, but they're not normally asked to speak. We get completion rates of about 30%. If you're the kind of person who does surveys at work, or sitting in front of the TV with your family [speaking is more problematic]. So, it's not just the technology, it's the circumstance."

However, Comber thinks the rise of voice-controlled tech will make this form of market research easier.

"It will change because so many things are coming out now that are voice. People will get used to randomly talking to things in a way that a lot of younger people are; it's spreading through society."

MAKING AN ADVANCE

THE MARKET RESEARCH SOCIETY'S ADVANCED CERTIFICATE QUALIFICATION IS MORE THAN 15 YEARS OLD. **JANE BAINBRIDGE** TALKS TO SOME OF THE FIRST WAVE WHO STUDIED FOR IT, TO SEE HOW THE QUALIFICATION HAS HELPED THEM IN THEIR CAREERS

Just over 15 years ago, our new century was still in its infancy. The Queen was celebrating her Golden Jubilee, Arsenal beat Chelsea in the FA Cup final and Ford stopped manufacturing at its Dagenham car plant. Meanwhile, in the more specialised world of market research, the Market Research Society launched its Advanced Certificate qualification.

It was the start of what's turned out to be the MRS's biggest qualification – a vocational equivalent of an undergraduate degree. Taking about a year to complete, it's become the benchmark for competence in the research sector. Today, up to 400 people take it each year and, since its launch, 6,500 candidates across 40 countries have studied for it. But what about those who were there at the start? What do they remember of it and how have their careers developed since they started to study in 2002?

Martin Wootton was at RS Consulting, and he is still at the same business – only, now, its called Breaking Blue and he's research director. For Wootton, as for many who study for the qualification, the Advanced Certificate was part of the agency's graduate trainee scheme.

"It had a weekly graduate training schedule for the first two years, during which you learned the basics, and it ran in tandem with the MRS. So you were sent on the summer school, and were expected to take the MRS diploma and certificate alongside our own work," he says.

Doing the course on top of his day job was, Wootton says, surprisingly easy, because it fitted so closely with what he was doing. "A lot of the qualification was directly relevant to a project I'd just done. I could see why they wanted me to look at this – I was already aware of the complications and the issue. It's very much learning on the job, and the summer schools were good for speaking to people outside of the company," he adds.

Dema Metreweli is now head of business insight at BT, and sat the Advanced Certificate while working in BT's research team on its web channel. Metreweli had started in marketing, but decided that was "a bit fluffy", so moved into market and customer research. Once there, her manager was very supportive of her doing the certificate – but what does she remember about the studying?

"I recall it being in the dying days of paper-based training – I was frequently lugging a large file around with me, including on holiday. As well as my day job, I had a toddler and a baby on the way – so studying required good time planning," she explains. "But, as I was at the start of my market research career, I viewed it as an opportunity to be more effective at work, and a timesaver overall.

"An abiding memory is taking the exam at a university in East London, nine months pregnant on a very hot day, and being told the exam room was on the 9th floor and the lift was broken! I spent the exam praying that the baby wouldn't decide to make an appearance before I'd managed to get back home."

Andrew Dalglish, now managing director of Circle Research, was at BPRI, WPP's specialist B2B research division in 2002. "I pushed to study for the Advanced Certificate shortly after I got through the door for three reasons: I like learning; I recognised that if I was going to be an expert in research, I needed to have a solid understanding of the core principles; and I thought it would benefit my career prospects," he says.

Dalglish found it demanding to fit study around life working in an agency, but by pencilling in a set time each evening he could make steady progress without it becoming overwhelming. "I'd advise anyone studying for it to keep in mind the idea of short-term sacrifice for long-term gain," he says.

So perhaps the most important question of all – has it helped people's careers?

Shehnaz Hansraj, head of research at Viking Cruises, says that although employers were less aware of it back then, doing the Advanced Certificate gave her valuable confidence in her ability early in her career.

"I joined forces with a fellow colleague on the assignment – we had so much fun bringing together our different perspectives when working on our assignment entry," she remembers.

Metreweli also sees it as an excellent starter in terms of the tools and techniques needed. "I think it helped me get my career off the ground and build credibility more quickly. It also got me back into studying and learning; I've done a few things since, including other MRS courses, Chartered Institute of Marketing qualifications and another degree."

Dalglish agrees that it can be a boost to your career. "As I could design quality research projects early on in my career, I quickly became trusted to write proposals – and, with that, came ownership of the project and the client relationship. These are tasks normally reserved for the upper echelons of an agency, so I quickly progressed through the ranks. The certificate also demonstrates to an employer that you take your work, and the way in which you represent their brand, seriously. That oils the promotional wheels," he says.

Having letters after your name sets you apart, argues Wootton. He always encourages graduates to do it and Breaking Blue is an accredited centre for sitting the exam. "It's the one thing you can do to have an academic view of research. There are a lot of people in the industry – great researchers – who have learned on the job, sometimes at the expense of a more academic view. The theory behind it complements what you learn day to day," he says.

Would it make a difference to him when hiring? "It might separate two close candidates. You have to put in the extra hours outside the office to study for it. It shows you're a go-getter."

DIFFERENT MINDSETS

DIVERSITY OF MINDS IS OFTEN FORGOTTEN IN WIDER DISCUSSIONS AROUND DIVERSITY. BUT BUSINESSES CAN BECOME MORE RESILIENT AND INCREASE THEIR UNDERSTANDING OF THE PEOPLE THEY LOOK TO REFLECT WITH BETTER COGNITIVE DIVERSITY INSIGHT.

BY **KATIE MCQUATER**

As the sun rose on 24 June 2016, and it dawned on the UK that it had voted to leave the European Union, the media scrambled to capture the nation's shock. The terms 'filter bubble' and 'echo chamber' soon entered the common consciousness as politicians, the mainstream media and businesses realised they had failed to read the situation accurately.

Donald Trump's election as US president a few months later reinforced the sense that the version of reality understood by the media and the establishment was only half the picture. The filter bubble had led to a widespread lack of representation of all points of view – a cautionary tale about the impact of failing to represent a variety of perspectives, and one that reinforces the need for diversity within all industries.

Marketing has been grappling with its diversity issues for a few years, with several high-profile campaigns – including the 3% Movement, Creative Equals and Stripes – pushing for greater representation of women and people of diverse ethnic backgrounds, to more accurately reflect the British population. Moreover, several studies have indicated that greater diversity leads to better results. Research published by McKinsey in January found that companies in the top quartile for gender diversity are 21% more likely to experience higher-than-average profits than those in the bottom quartile – a figure that rose to 33% for ethnic diversity. Only recently, however, has the spotlight been turned on the issue of cognitive diversity – that is, diversity of minds.

Cognitive diversity has been defined as 'differences in perspective or information-processing styles', and it is not predicted by factors such as gender, ethnicity or age – the factors we can see. Businesses' focus on diversity of thought has, so far, been centred on the area of neurodiversity, which refers to the natural range of differences in human brain functions and thinking styles, including autism, dyslexia and dyspraxia. Companies such as Direct Line and Microsoft have launched programmes to advocate for neurodiverse people, while BT has changed the way it recruits IT candidates to promote neurodiversity.

The broader definition of cognitive diversity is difficult for businesses to consider, because, as with neurodiversity, these differences aren't visible. Factors differentiating people's thinking styles and perspectives aren't as easily measured as gender and race.

As shown by research on greater diversity and inclusion more broadly, cognitive diversity leads to better business performance. A 2017 study by Alison Reynolds, of Ashridge Business School, and David Lewis, of London Business School, used the AEM cube, a tool developed by psychiatrist Peter Robertson. It measures differences in knowledge processing and perspective – determining the various ways people approach change – in teams doing a strategic execution exercise. The best-performing teams – that is, those that completed the task in the shortest amount of time – were found to have diversity of knowledge processes and perspective, while the worst performers were less diverse.

Considering different personality types is also becoming a priority for employers; introverts, for example, are more likely to find it difficult to concentrate in open-plan office environments and find long meetings draining, while extroverted people are generally energised by being around others, as highlighted in Susan Cain's book, *Quiet: The Power of Introverts in a World That Can't Stop Talking.*

Getting the right balance of people is critical, says Matt Dodd, managing partner of Kantar's analytics practice. "It's not just recruiting people from a diverse range of backgrounds and specialisms, it's about employing people who think differently and are a mix of personality types. That means bringing together extroverts and introverts, active communicators and more passive types, people who are good at synthesising information and those who are more questioning."

Of course, a host of different thinking styles and perspectives can create potential for discord, posing challenges for managers. Dodd says: "Opposites don't always attract and, while having more cognitively diverse teams can spark new ideas, there can also be clashes. Managers need to ensure that contrasting opinions result in more rounded discussions and better decision-making rather than a breakdown in social cohesion."

However, adds Dodd, cognitive diversity strengthens the ability of teams within the business to handle complex problems. "The main benefit we see from cognitive diversity is improved problem solving," he says. "Diverse teams adapt quicker and better to change because they are used to having to adapt constantly to different perspectives on the same issue. They're better at tackling complex situations. This flexibility and resilience removes reliance on one person – things can't just break down when a team member isn't present."

Ian Murray, founder of house51, believes it's vital for research companies ▸

to increase the level of cognitive diversity within their businesses to hold up a better mirror to society. "Market research is supposed to reflect the messy reality and nuanced complexity of what's going on in the world. If you're only looking at it with a very narrow lens, and projecting that in the kind of research you're doing, you're narrowing its potential at a fundamental level."

Researchers aren't immune to unconscious bias, he says. "We all strive for objectivity, but none of us are totally objective – we're all products of our environment and culture."

The problem with biases and lack of cognitive diversity is that these issues are so ingrained it can be hard for businesses to acknowledge they have a problem. Human beings, particularly in an organisational setting, tend to lean towards consensus reality and rely on received wisdoms. One example, says Murray, is the common idea that consumers are no longer looking to spend money on material possessions and instead want experiences. That may be the reality for a research professional living and working in London – it may not necessarily be the case for others in different parts of the country or with a different background.

House51 is working on a research project with Trinity Mirror to map cognitive diversity in the UK population, compared to that of the media and marketing industries. The study will identify the psychological and behavioural differences between those working in marketing and the general population, and explore why building a better understanding of different thinking styles is key to avoiding disconnect between advertising and the lives of real people.

Insight organisations can begin to tackle the issue by turning the lens on themselves, says Murray. "Right now, businesses don't even know where they stand. You can hardly move in an industry publication without somebody talking about neuroscience and behavioural economics, but very little of it is being applied to ourselves and to our own businesses."

THE JOB MARKET

FAIR RECRUITMENT

We are being flooded with hashtags reminding us that the world is unequal – that people in power take advantage of weaker people, male and female. The debate is strong and multifaceted and, currently, it's opened up in film, entertainment, fashion, media and politics. We know it's everywhere, so it must be present within the market research sector.

Recently, the MRS has taken a strong position on the issue of diversity, and groups are being set up to tackle this issue in our sector. This is to be applauded; market research fares better than many of our marcomms relations, but there are still gaps in equal pay and inclusion that we can address in practical terms.

Equal pay is a particular issue and, rather than wait for the public embarrassment that the BBC has faced, make the change now. Companies of more than 250 people must now declare their gender pay gaps annually. This will apply to many of the big players in the market research sector, so companies should address the issue now rather than risk unmotivated and dissatisfied staff.

It's important to note that equal pay isn't just a gender issue – it doesn't just apply to men and women, but also to graduates and non-graduates. Everyone in your organisation should be paid equally for the work they do – equal pay for equal work.

> "When you make an offer to a candidate, propose the salary that the job deserves, not one based on their current salary. Each role should have a pay band and that's where you need to make the offer – it's fair"

Create pay bands for positions and communicate these at early stages of the recruitment process. You don't need to know a current salary for a candidate; they need to know the pay band and, if it matches their requirements, then they can apply.

We can take positive steps towards removing bias in the recruitment/hiring process. Eventually, that will lead to a more diverse workforce that truly represents the society in which we live and, in turn, lead to better outputs for your clients.

There are specific things you can do as hiring managers. Language is key in both written and verbal communications. Check your job descriptions, job adverts, internal comms on vacancies – are they gender-neutral?

When you review CVs, are you screening on degrees? There have been several cases recently where companies – by actively opening up to non-graduates – have hired from a more diverse talent pool.

When you interview candidates, are you selecting a mixed panel? If you want to encourage diversity, show it at these early stages and make sure the prospective candidate can see that your diversity policy is practised.

When you make an offer to a candidate, propose the salary that the job deserves, not one based on their current salary. Each role should have a pay band and that's where you need to make your offer – it's fair.

Talk about it in your business at all levels, and make sure it forms part of your day-to-day conversation, and you will have a happier, healthier and more diverse business.

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

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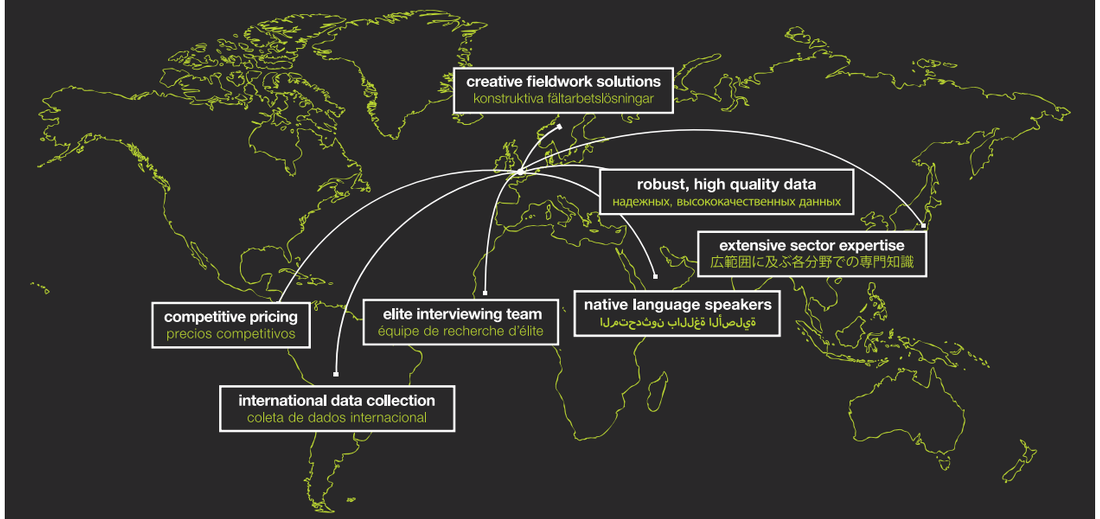

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COMPLIANCE BEYOND GDPR

NEXT MONTH, THE GENERAL DATA PROTECTION REGULATION COMES INTO FORCE, BUT THIS ISN'T THE ONLY AREA AFFECTING POLICY AND REGULATION FOR MARKET RESEARCHERS, AS **DR MICHELLE GODDARD** EXPLAINS

By now, you have probably received a variety of 'choose me' emails, as organisations carry out re-permissioning exercises to ensure they can continue to market and communicate with you legally after 25 May.

This is the date when the General Data Protection Regulation (GDPR) will be enforced by all supervisory authorities across the EU, including the Information Commissioner's Office (ICO) in the UK. Indeed, the imminent enforcement of the GDPR is significantly influencing the manner in which businesses of all sizes, across all sectors, manage their approach to the collection and use of personal data.

Granting people effective controls and real choice over the use of their data will be key to businesses that wish to thrive in this new and changing environment. MRS has always stressed the importance of the social contact between research participants and researchers – and reflecting user needs and expectations in the design and management of research projects continues this.

In addition to GDPR, however, MRS has engaged with a range of regulatory and policy initiatives, to ensure any impacts on commercial research are considered in regulatory and policy approaches. Here I briefly highlight the other areas researchers should pay attention to – particularly in the changing environment for telephone and digital research.

WIDER CONTROLS ON UNSOLICITED CALLS

MRS works with a range of stakeholders to ensure measures have been put in place to minimise adverse impacts from call-blocking initiatives. These include:

- Research with BT before the launch of the telecom provider's Call Protect service, which allows customers to opt in and divert unwanted or nuisance calls to a 'junk' voicemail
- Engagement with the Direct Marketing Association (DMA) on the TPS Protect app, to ensure accredited MRS company caller IDs are assigned trusted status
- Ongoing efforts with technology and systems used by other operators to facilitate mobile and landline telephone research.

Compliance by members with the updated MRS Regulations on Predictive Dialling – which is based on the revised Ofcom Statement of Policy on Persistent Misuse – will minimise the chances of enforcement action. It is important that research organisations display a valid returnable caller line identification. This must be capable of receiving a return call that connects to either an agent or an automated information message, and organisations must aggressively and effectively manage automated dialling systems to minimise the risks of making silent or abandoned calls.

Ongoing participation in Operation Linden – a broad-based multi-agency group, chaired by the ICO, that coordinates activities to maximise enforcement opportunities against individuals and organisations in this area – will ensure that ethical, legitimate telephone research is safeguarded.

PENDING DIGITAL REFORMS UNDER E-PRIVACY

The proposed EU e-Privacy Regulation will replace the provisions in the Privacy and Electronic Marketing Communications Regulations (PECR) governing marketing and unsolicited calls. It will make this regime more consistent with the GDPR, especially in terms of a stricter test for consent and the higher level of sanctions that can be applied for breaches of the regulation.

Although the e-Privacy Regulation will doubtless also change the way cookies or similar tracking technology through websites, mobile apps and messaging services are used, the exact requirements are still unclear, and the interaction between this and the GDPR does not fit well currently. Reforms to e-privacy will also probably include some additional requirements for direct marketing.

MRS is directly engaged in these discussions at national and EU level, and businesses should hold a watching brief as these proposals are discussed and negotiated in the EU trilogue process, between Council, Parliament and the Commission.

LOOKING PAST GDPR

GDPR compliance is a pivotal activity for researchers and MRS has published extensive guidance notes aimed at encouraging accountability of research organisations and transparency, plus privacy by design and default at the core of research projects. We are also working to ensure that the research exemption and the public interest approach, set out in the UK Data Protection Act 2018, is flexible enough to cover the wide economic and societal benefits from research done by commercial, non-profit, academic and public sector researchers.

As GDPR enforcement approaches, however, it is critical to remember the wider regulatory framework that impacts on commercial research. From 2017 into 2018, there is a mix of data initiatives targeted at building the digital economy.

MRS will continue striving to give timely guidance and help navigate the changing regulatory reality. We will also seek to have input in policy discussions and regulatory interventions to shape key initiatives and ensure there is a proportionate, balanced environment for the promotion and protection of research.

Dr Michelle Goddard is director of policy and standards at MRS

Data, trust and engagement

Firstly, thank you to all that made last month's annual conference such a wonderfully inspiring event. We enjoyed record levels of engagement over the course of Impact Week 2018, which included for the very first time six client open houses as well as our two day conference.

I urge those of you that couldn't attend to take advantage of the extensive video and reportage covering the key notes and various sessions, and the interviews with starry names like Ian Hislop and Julia Hobsbawm and our own industry leaders. Speaking personally, for sheer motivation I would have to pick Maggie Aderin-Pocock as she urged everyone to become a role model, and Dexter Dias who reminded us 'you only get the justice you are prepared to fight for'.

As well as launching a new MRS Delphi Group report on trust and technology (see opposite) I was also particularly proud to announce a new MRS / Kantar joint initiative. Our vision is called Intelligence Capital™ (in which insight is integral). We expect it will become the third core requirement for successful business, alongside financial and human capital. To reinforce our commitment to this vision we trademarked the phrase and plan to build a compelling model to make the connection with business growth. The MRS Delphi Group will be driving the editorial development of this project with the help of those clients who have been so supportive of Impact Week.

Lastly, it would be remiss if I signed off this issue of *Impact* without acknowledging the elephant in the room that is GDPR. I wish you all fortitude as you make final preparations to ensure that your organisation complies to the regulation that comes into force on 25 May. MRS is available to support all its members in these preparations, both in the tools and support we have provided online and via our bespoke consultancy services. However painful the process of compliance, the net result will be (as our new Delphi Group report explains) more trusted relationships with our customers and research respondents, which can only be good thing.

Jane Frost CBE, chief executive, MRS
jane.frost@mrs.org.uk

MY SOCIETY

Best of Impact 2018

Watch video coverage of the annual conference including:

- Keynotes from Ian Hislop, Julia Hobsbawm, Jayne-Anne Gadhia, Dr Maggie Aderin-Pocock, Val McDermid and David Schneider.
- Sessions and panel debates on data science, fake news and trust.
- Interviews with panellists and delegates on the sector's most pressing issues.

mrs.org.uk/impact2018

New trust report

MRS Delphi Group has published a new report called 'Great expectations: how technology impacts consumer trust'. With new primary research, the report includes case studies on Monzo, Nationwide, ITV and Skin Ninja. Download the report at **mrs.org.uk/greatexpectations**

Intelligence capital

Watch clients including Tesco, Barclays and Diageo discuss why 'Intelligence Capital' is an unmissable opportunity for the sector: **mrs.org.uk/intelligencecapital**

MRS Roadshows

The MRS team is on the road again in 2018, presenting at our roadshows around the UK. These informal events are a great way to find out what is planned for MRS and the sector in 2018, and hear the latest advice on GDPR. See calendar opposite and online at **mrs.org.uk/roadshows**

GDPR – helping you prepare

MRS has developed a suite of support materials and resources to help your organisation understand and comply with the GDPR, including webinars, briefings and training. **mrs.org.uk/gdpr**

We want to make your life easy

- Your MyMRS member web account gives you access to all MRS content and services.
- Create it now and you can then log into **mrs.org.uk** or **research-live.com** to access your member directory profile, personal information, history of transactions, and ALL premium content, including *Impact*, Research Live, *IJMR*, and MRS guidance and case studies.

Calendar

Member events

April
18 – Revealing Perspectives
23 – Roadshow – Edinburgh
24 – The Wonderful World of Behavioural Economics – Northern England
26 – Speaker Evening – Conscious Conversations – London

May
6 – IJMR Lecture, London
3 – Roadshow – Birmingham
10 – Roadshow – Bristol
17 – Roadshow – London
22 – Speaker Evening – AI and Machine Learning: Measuring Emotion

June
4 – Awards Dinner
8 – Excellence Lunch
21 – Speaker Evening – The Secret to High Quality Participants
27 – Slow Research – Northern England
28 – ADAN Event

Training highlights

April
16 – Conducting Desk Research Effectively
Discover the value of desk research as a research method for market monitoring, competitor analysis and sector profiling.

20 – Behavioural Economics in Research
How can we leverage behavioural economics in our analysis to ensure we come to more impactful recommendations?

May
1-2 – Game-Based Research Methods
How to use gamification to engage your communities or individual participants, whatever their ages and wherever they are in the world.

8 – Cyber Security and ISO27001
Understand the steps that organisations can take to ensure that data is securely collected, stored and accessed – critical for GDPR.

22 – The Science of Behaviour Change
Apply the insights and lessons from behavioural science to better understand and influence people's behaviour in the real world.

June
5 – Creating Purpose for Individuals, Teams and Brands
Many people are focusing on their purpose and companies are reaching out to PR/marketing/research firms to help them define their organisation's purpose.

Conferences

May
10 – FMCG Summit

June
14 – Media Research Summit
28 – B2B Conference

Find out more at mrs.org.uk/events

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 the *IJMR*

RESEARCH-LIVE.COM

BE360: Financial feedback
Financial education seems to have little impact on financial capability – common flaws and biases can prevent us from making good money decisions and are not easy to 'educate' out of us. But giving feedback is a simple tool that can change our financial behaviours for the better, write Crawford Hollingworth and Liz Barker in the latest of the BE360 series.
www.research-live.com/be360-financial

Actionable insights require greater understanding
The term 'actionable insights' has become a cliché. Circle's Andrew Dalglish looks at the requirements for genuinely actionable insights, including challenging the brief so that the issue explored is the issue truly faced, and bringing stakeholders into the process early on to give them everything they need to act.
www.research-live.com/actionable-insights

From the big idea to the human idea
Research and creative have long had a tricky relationship, but advertising, increasingly, needs to draw on the human truths that researchers can give. Northstar Research's Rhiannon Price argues it is time for researchers to acknowledge their role in the process, be more flexible and less purist, and think about how they can deliver insights in more inspiring ways.
www.research-live.com/human-ideas

Programmatic 2.0: The future of sample
The impact of automation is now visible across every phase of a market research project, from programming to sampling to reporting. In the sample space, the first wave involves the automation of basic tasks like the communication of project specs and quotas. The next generation, Programmatic 2.0, promises to improve the accuracy and reliability of our data and our operational dependability, says P2Sample's JD Deitch.
www.research-live.com/future-of-sample

IJMR

Mind-reading a friend: A better way to ask the polling question?
This study by John Aitchison suggests that asking respondents for predictions about the way their friends may vote gives more accurate – and more campaign-sensitive – polling results than asking people to declare their own voting behaviour. Additionally, it was the only approach that seemed to predict a decline in turnout among older voters.

Examining survey response styles in cross-cultural marketing research
Survey responses are influenced by response-style biases that vary across individuals, countries and cultures. This study, by Christoph Beuthner, Maren Friedrich, Carsten Herbes and Iris Ramme, investigated response style biases in a comparison of surveys from Mexico and South Korea. It found that while respondents in both countries preferred answering items with 'agree' or 'strongly agree', respondents in Mexico were about twice as willing to 'disagree' or 'strongly disagree' than those in South Korea.
www.mrs.org.uk/resources/ijmr

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- James Powell

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jtd.mr/twentyyears