# impact

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Using evidence & insight to make a difference

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**Stan Sthanunathan on augmented intelligence**

**Cabinet Office and citizen insight**

# City living

By 2050, 68% of the world's population will reside in cities – our report looks at the behaviour and infrastructure implications of this urbanisation

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# Access for all

Toxic was the Oxford Dictionary's word of the year for 2018: how appropriate – but, also, how deeply depressing. No new year should start on such a downbeat tone, even if it does sometimes feel as if we're in the middle of a collective cataclysm.

If I were to pick a word of 2018 based on the time spent talking about, listening to others talk about, and writing about a subject, then mine would be 'inclusion'.

The #MeToo campaign kick-started a consciousness-raising movement that reverberated throughout the workplace and finally made organisations wake up to their previously often narrow outlook.

We are only at the start and there is a huge amount still to be done. What's so wonderful about inclusion, however, is that it is all encompassing – forcing us to continue to question our biases and consider who remains excluded.

Looking forward to this year, perhaps the next logical step in this etymological journey is accessibility – and this is a topic that is covered in all its forms in this issue of *Impact*.

Our long read on urban mobility (p28) is a fascinating report on the changing nature of city living, and the complexities and interactions that brands across all sectors must consider as population densities increase.

There's no doubt that digital innovations in transport have improved accessibility. On a personal level, it's proved to be a huge – and welcome – leap from long, cold waits at Leeds bus stops to Waze-enabled, traffic jam-avoiding car journeys, although our report raises profound questions about how private app-enabled businesses can disrupt carefully planned public transport infrastructure.

Journeys rarely involve just one mode of transport and the next stage clearly requires these separate entities to 'speak' to each other more.

Access is multifaceted and, when it's not available, it has significant life-restricting consequences.

From physically disabled people who may live near public transport but can't use it – because it's not been designed to accommodate their needs – to the physically able living on isolated edge-of-town estates with no, or extremely limited, public transport to get to work or the shops.

These communities can be both physically and societally 'hard to reach'– and, for the latter, that's where good market research comes to the fore.

It's something that's discussed in detail in our spotlight article (p18) and it motivated Kenny Imafidon to set up his agency, ClearView Research (p77). Marginalised communities need to have their voices heard and it requires market researchers to be open-minded in finding the best methodologies by which to access their opinions.

Specifically, Michelle Goddard (p80) writes about designing research so it is accessible for people with disabilities. This is not necessarily about abiding by the law, but rather our ethical duty to be as inclusive as possible.

It's access all areas for 2019.

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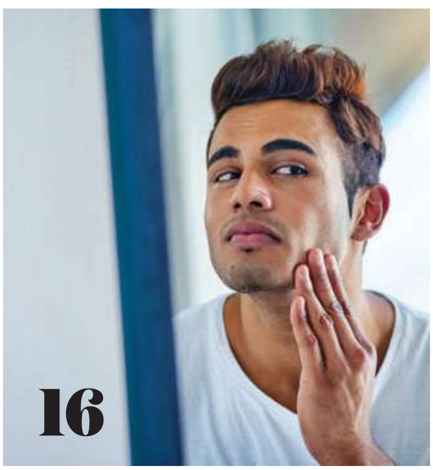


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## Columnists

# Where is the value?

There are two questions that always fascinate me about this crazy business of ours. One is: what are the activities on which we spend the most time, yet offer the least value? The other is: what are the activities that offer the most value on which we spend the least time?

One candidate for the first category is process. To be honest, I don't much believe in it. I've always been a bit of a fan of Paul Feyerabend's book *Against Method*, in which he turns a sceptical eye on scientific methodology.

His argument is that, when you unearth the real events that led to the important scientific discoveries in history, you find they bear little resemblance to the pure approach to which scientists claim to adhere. They are, instead, a surprisingly messy mixture of happenstance, serendipity, reversals, blind alleys, red herrings and lucky guesses – made to look like logical process when narrated in hindsight.

You find the same randomness in the origins of many of the greatest moments in film. Stanley Kubrick had commissioned an original score for *2001: A Space Odyssey*. The music of Johann Strauss was added to silent footage of rotating spacecraft by a model-maker who wanted to present his initial work to the director. Feeling silence made the presentation a little stark, he grabbed the first classical recording he could find for the presentation, and apologised for the arbitrary soundtrack. Kubrick leaned back in his chair: "They're going to call me a genius."

Many creative campaigns are no different. I recently learned that the Dulux dog came about by accident. In one story, it belonged to the owner of the home where a Dulux advertisement was being filmed and wandered onto the set – so the director decided to keep it. In another, it was recruited at the last minute to make a cold set seem a bit warmer. Either way, it was not planned.

Although I am sceptical about process, I am a great believer in checklists – they impose order on what you do without imposing an order on how you do it. I have never believed that, in the creation of something new, Activity A must always precede Activity B.

The process-fetish arises from self-deception. An agency naturally wants to reverse-engineer its latest successful campaign to pretend it has hit the creative mother lode and can replicate that success unfailingly. The client likes the idea of process because it feels as if it is de-risking the random business of producing an ad.

But what is the opposite of this? The activity that could be so valuable on which we spend too little time?

If creativity is the search for something that works but doesn't make sense, its neglected twin is the search for things that make sense, yet don't work.

The reason this is neglected is because we automatically trust anything that seems to make logical sense. This leads to an asymmetry in business decision-making.

When you propose something creative, the burden of proof is set very high. 'How can you be absolutely sure this animated meerkat is going to sell insurance?' On the other hand, when you do something consonant with received economic theory, the burden of proof is set very low. 'The product is underperforming, so we're going to drop the price.'

**"The correlation between 'works in theory' and 'works in practice' is far weaker than we like to believe"**

Not a penny is spent trying to isolate and eliminate the costs of unpoliced logic. But if you talk to anyone in direct marketing or programmatic advertising – or any field where behaviour is richly measured – you realise that the correlation between 'works in theory' and 'works in practice' is far weaker than we like to believe. $20-off vouchers often reduce a product's sales. A bizarre 40% fall in charity donations happened recently when we tested highlighting Gift Aid. In numerous cases, smaller discounts are more effective than large ones.

Too often, these discoveries emerge by accident; because it is naively assumed that a money-off voucher must increase sales, no one tests the alternative. It is only when a software glitch causes the mention of the offer to be removed that the scary truth emerges.

Rational decisions should be tested and measured with exactly the same rigour as imaginative ones. Millions of pounds are wasted every year because ideas that make sense in theory are given a free pass.

If you think creativity's expensive, you should try rationality.

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# SEE THE WORLD FROM ISIAH'S PERSPECTIVE

# World view

News, analysis and insights from around the globe, edited by Katie McQuater

**92%** of people in the UK, US, Australia and China claim to be living more responsibly

(p12)

**56%** of girls in **Malawi, Rwanda, Tanzania, Nigeria, India and Bangladesh** do not own a phone, compared with **33%** of boys

(p14)

"Childlessness in the western world is now more common than ever before. Moreover, those who make this decision by choice are a significantly growing segment."

(p10)

**63%** of young men in the UK have experienced depression

(p16)

"What people believe is good for the planet and what changes they are willing to accept personally can look very different."

(p12)

**A quarter** of women in Saudi Arabia have applied for a driving licence

(p15)

**Only 8%** of people who are **by choice childfree** in the UK **feel represented by brands**

(p10)

# The other choice

**A growing number of the UK's population have made the active decision not to become parents – and, until now, have remained unrecognised and misunderstood. Research from Bamm highlights the audience in every brand's blind spot.**
**By** Nathalie Gil

We all know the classic life stages: pre-family, family, post-family. Behaviours and attitudes can change significantly depending on where people are in their life journey. There is, however, a growing segment that does not fall into any of these descriptions. In fact, it may be a blindspot for research. These are the people who ignore the path to parenthood and make the active choice to go childfree. Say hello to the 'otherhood'.

Childlessness in the western world is more common than ever before. In the UK, almost half of women who turned 30 in 2016 did not have any children, up from 18% in 1976, according to ONS data. US Census Bureau data shows that 20% of women aged 40 to 44 were childless (up from 10% in 1976). Moreover, those who voluntarily make this decision are a significantly growing segment: one in five 25- to 55-year-olds without children in the UK is voluntarily childfree – or, as we have defined it, part of the otherhood.

Over the past three months, Bamm has been immersed in their lives, conducting a survey and ethnographies, and gathering expert inputs in the US and the UK, to demystify their still relatively unknown lifestyle and find revealing opportunities for brands.

> **"Reasons for otherhood may vary – from lifestyle to the environment – but the behaviour of those who choose it has proven to be surprisingly unifying"**

## A misunderstood lifestyle

Until the 1960s and the introduction of the contraceptive pill, being childfree was a woman's issue: usually seen as a consequence of a biological or circumstantial factor. Conversations in culture would project on them the predictable archetype of bitter stepmothers.

After the sexual liberation, otherhood became a choice – albeit filled with judgement: some portrayed it as 'a phase' before realising that having a child is the natural path in life. Many viewed it as a lifestyle deviation: childfree people were seen as miserable, lonesome singletons, or superficial, self-obsessed bachelors. The characters of Bridget Jones and Daniel Cleaver are a great example of this stereotype. So it is unsurprising to find that only 11% of otherhood people feel represented in films and TV, according to our study. In advertising, just 8% feel that brands represent them.

It is only in more recent years that otherhood has begun to be talked about explicitly in culture, mostly driven by the diversity agenda of media companies such as Netflix. Celebrities shout loud about this choice, too; big names such as Oprah and Ricky Gervais have spoken up, showing a latent need to start the conversation and normalise this lifestyle choice.

## Breaking assumptions

The reasons for otherhood may vary – from lifestyle to the environment – but the behaviour of those who choose it has proven to be surprisingly unifying. First, their life is cyclic, not linear. The otherhood lifestyle differs from that of other childfree people, who are more likely to be saving for a family and following a linear path. In our survey, the otherhood are likely to have flexible and ever-changing jobs, claim to be more spontaneous, and are less likely to enjoy making long-term decisions.

They are not self-absorbed, but considerate; they invest time and money into learning and personal development, reinventing their lives, dedicating time to fulfill passions, such as life coaching or helping on conservation projects. They are also more charitable and care more for people than those with children.

Lastly, they are not workaholics – they value a better work-life balance; even

without a significant difference across socio-economic profiles, they are more than twice as likely to go to galleries, theatres or museums than others who are childfree.

## A blueprint for brands

There is a great opportunity for the research community to dig deeper into this demographic, and for brands to raise awareness of the size of opportunity to cater for this group.

Here are some ways to be relevant to this group:

- **Fit their unstructured lifestyle:** the lack of routine and a rootless life allows otherhoods to carry a modern lifestyle that demands brands to adapt. Solutions that make decisions for them, such as meal-kit Hello Fresh, or brands that allow them to share a lifestyle without commitment – such as designer dress and accessories supplier Rent the Runway – respond to this unorthodox way of living
- **Cater for their crafted purpose:** this audience avoids virtue signalling and puts a conscious effort into identifying brands and solutions that generate the best holistic impact. Brands that prove this are likely to win their hearts
- **Include, don't highlight:** communications have come a long way in portraying diverse identities across different genders, ages and ethnicities, but family compositions still dominate the scene. There is a great opportunity to normalise this lifestyle in media.

Jeremy Poole, planning partner at Grey London, says: "It's part of the diversity agenda. You don't necessarily have to pigeon-hole them as different – just respecting the fact they exist will be a huge step forward."

The world of research has just started to understand this intriguing segment of the population. There is still a lot of investigating to be done by agencies and brands alike. It's time to ditch the conventional life-stage approach and include otherhood in your sample: this is an important demographic that brands just can't afford to keep in the dark.

**Nathalie Gil is research director at Bamm.**

**Bamm's research consisted of cultural analysis, expert interviews, 12 in-home and online ethnographies, and a survey – conducted in September 2018 – of 1,000 childfree people in the UK (495 of whom are part of the otherhood).**

**The term 'otherhood' is inspired by Melanie Notkin's *Otherhood: Modern Women Finding a New Kind of Happiness*.**

**A growing demographic**
**Otherhood represents ⅕ of the childless population**

**They feel misunderstood**
**62% feel their choice is misunderstood**

**A cyclic life**
**47% feel insecure making long-term decisions versus 37% of others who are childfree**

**Life-aholics**
**43% of voluntarily childfree people disagree that they focus on their career over their personal lives, compared with 35% of others who are childfree**

**Considerate**
**48% of childfree people bequeath money to charity versus 12% of parents**
(Source: Texas Tech University, 2014)

All statistics are taken from Bamm's Otherhood survey, unless stated otherwise.

# Making a meaningful impact

**Research from J. Walter Thompson has explored global consumer attitudes to sustainability, highlighting an opportunity for businesses to play a greater role in encouraging sustainable consumption.**
**By** Katie McQuater

Sustainability is shifting. What were once viewed as niche behaviours and beliefs are becoming mainstream – the adoption of veganism and 'flexitarian' lifestyles, and growing unease about single-use plastics, are just two examples of heightened awareness of the damage human habits are doing to the planet.

These attitudes are far from universal, however – nor does a shift in awareness necessarily translate into meaningful impact. A recent survey of adults in the UK, US, Australia and China, by advertising agency J. Walter Thompson (JWT), has highlighted some paradoxical attitudes to sustainability and made some recommendations for brands.

While 92% of the survey respondents claim to be living more responsibly, the research showed gaps between attitude and behaviour. What people believe is good for the planet and what changes they are willing to accept can look very different. For instance:

- 64% of respondents globally are in favour of car-free cities, but only 15% said they would definitely be willing to forego their vehicle to help the environment
- 73% think everyone should have to switch to renewable energy, but 67% don't know if their supplier is good or bad for the environment, and 61% say they don't use renewable energy because it's too expensive
- 86% agree that people buy too many clothes, but 40% admit they often buy new clothes to keep up with fashion.

The discrepancy between reported and actual behaviour was a key consideration for the researchers, who expected "a certain amount of over-reporting", according to Marie Stafford, European director of the Innovation Group at JWT. For example, while 70% of UK respondents claim to always recycle, the official data indicates that less than 50% of household waste is recycled.

"We believe there's a small skew attributable to those wanting to feel as if they are saying the right thing – but, equally, there are gaps in knowledge too," says Stafford. "People probably think they are recycling properly but aren't aware

that they need to rinse plastic or avoid food contamination and so on."

Changing behaviour is an important part of sustainability. "Ultimately, though," says Stafford, "people can only do so much. Even with the best intentions, sometimes the options just aren't there in the marketplace. Many environmentalists say climate change can't be solved at an individual level."

## A new face of sustainability

The main motivations for sustainable living are intrinsic, not extrinsic – suggesting consumers are driven more by how sustainability makes them feel, or a desire to do the right thing, than by social proof associated with the opinion or judgement of others. When people were asked to choose their main motivation, the top selections were: 'I know it's important to preserve the planet for future generations'; 'It's the right thing to do'; and 'I want to be able to make a difference'.

Stafford attributes these individualistic responses to issues, such as climate change and plastic pollution, capturing the consumer zeitgeist of late. "People seem to be taking this seriously in a way that has not happened before."

However, sustainability hasn't quite shaken off its beatnik connotations: 58% of respondents think sustainable products are less luxurious and more 'hippy'. The terms most commonly associated are 'responsible' (in the US, the UK and China) and 'quality' (China), suggesting there's a need for sustainable living to get a new image. Indeed, only 17% associated sustainability with 'cool' (increasing to 21% for Gen Z respondents).

"Brands can help drive more sustainable consumption by making it feel like something covetable or aspirational," says Stafford, citing Adidas's partnership with Parley for the Oceans and streetwear brand CHNGE. JWT's theory on this is supported by recent research from Germany and Switzerland, which found that people were more likely to try eating edible insects if they were described as 'delicious' and 'trendy' rather than good for them and the environment.

There is an appetite for companies to be more transparent and forward-thinking in this arena – 89% of respondents think brands should do more to educate consumers about the sustainability of their products, and 83% say that, all else being equal, they'd always pick the brand with the better sustainability record.

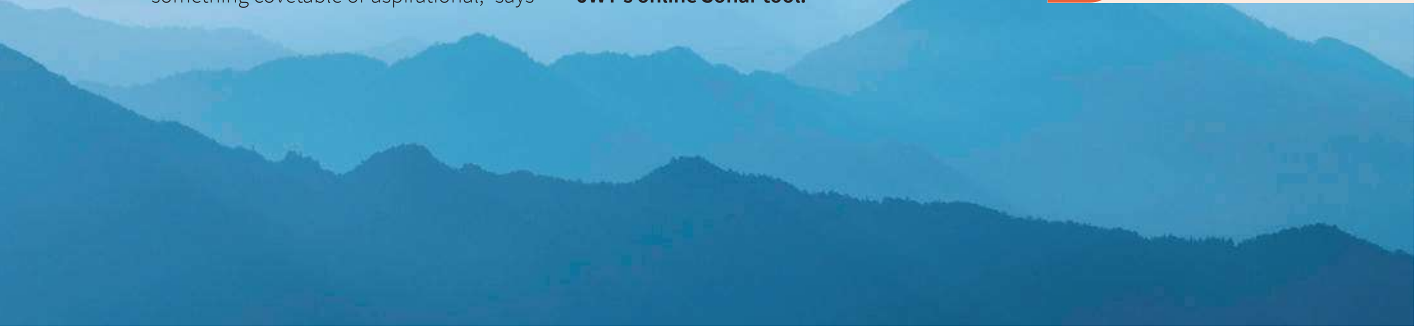
For Stafford, the most compelling insight from the research is that claims about sustainability now outweigh quality across most product categories. "We analysed what motivates purchase across 21 sectors and found that sustainability claims had a stronger impact on people's likelihood to purchase in all but three of them. For this to outweigh quality – in categories such as luxury, hotels, fashion or beauty – really underlines how important this issue has become to consumers."

Stafford believes the answer to sustainability lies in a collaborative effort. "Governments should put in place incentives and penalties, and businesses must get serious about their impact, and about providing the right choices for consumers. There's no silver bullet solution to this; it will take a patchwork of efforts."

**The quantitative survey of 2,001 adults in the UK, the US, Australia and China took place in June 2018, using JWT's online Sonar tool.**

## Attitudes to sustainability

- UK – 60% of British consumers strongly believe there is 'far too much plastic packaging these days', versus a global average of 51%
- US – 20% feel climate change is not an important issue, compared with 13% globally. Forty-four per cent do not want to see petrol cars phased out
- Australia – 85% say they should not have to pay more for sustainable products/services, but 90% agree that, if sustainable living could save them money, they would adopt it
- China – among those who say they could be doing more to adopt a more sustainable lifestyle, one third say they are not doing so because it's too much effort.



# The world in your hands

**Mobile phones can open up opportunities for girls in developing countries, but research from Girl Effect identified social norms that have to be addressed. By** Katie McQuater

Conversations about our increasingly digital world tend to assume mobile phones are universal. For many young people around the globe, however, owning – or even having access to – a phone is a distant prospect, and little is known about the barriers to mobile technology.

Non-profit organisation Girl Effect wanted to address this by studying how girls use mobiles and their barriers to access. Using a mixed-methods approach – which included interviews by technology-enabled girl ambassadors (TEGA) and online surveys – the research explored the issues that girls aged 13-19, in 21 countries, face when it comes to mobile ownership, use and behaviours.

More than half (56%) of girls surveyed in the TEGA interviews – in Malawi, Rwanda, Tanzania, Nigeria, India and Bangladesh – do not own a phone, compared with 33% of boys. However, 52% of girls (compared with 28% of boys) say they access a phone by borrowing one.

The findings reveal that mobile access for girls is more complex than simply owning or not owning one, says Kecia Bertermann, technical director at Girl Effect. "When we dig deeper into the stats behind a girl not 'having' a phone, we see that sometimes she's a borrower, or she might have a secret phone."

Cost is the main barrier for boys not owning a phone – and affordability is certainly an issue for both sexes – but the biggest issue girls face is societal: namely, their parents' safety concerns. "The reasons that keep girls in a state of borrowing rather than owning are often because of negative social norms – and it's tackling these that will be the biggest challenge for organisations," says Bertermann.

Such norms are often engrained in the girls, particularly when it comes to safety; 16% said girls don't own phones because they are unsafe – and while 45% of those who own a device say it makes them feel safer, a third say it makes them less safe.

Girls' environments have an impact on how they perceive mobile-phone use. Those who enjoy more freedom in their community and family tend to have greater levels of access to a phone and emphasised its role as a gateway to connections with others outside of their home/community.

**The phone paradox**

The online survey found that phones:

- Make half of all girls feel better connected
- Provide access to a much wider education (47%)
- Reduce boredom (61%)
- Increase access to restricted information (26%)
- Increase confidence (20%).

However, several girls noted that phone access/usage made them feel more stressed, harassed or bullied, or said phones increased others' control of them.

This finding was backed up by the online survey data: more than half of girls (54%) who never have to ask permission to use a phone said it makes them feel more connected, compared with 46% of those who need permission.

The research highlights how polarising phones can be. "Girls can simultaneously describe the phone as helpful for education, but also a distraction from school. They point to phones as helping them expand their social network – but also as a means of introducing them to 'bad friends'. Phones help them feel safe, allowing them to call someone in an emergency – but they also feel more exposed to danger in terms of potential theft and online harassment. These juxtapositions lead to complicated associations with the device."

The TEGA interviews were conducted with 1,371 girls and boys in seven countries. The online survey of 1,747 was conducted across 21 countries.

# Open road

**In Saudi Arabia, the ban on women getting behind the wheel was finally lifted in June 2018, with important ramifications not only socially, but for the country's auto market. By** Kerry McLaren

The lifting of the ban on women driving in Saudi Arabia is a historical milestone. It is one of the greatest measures taken by the crown prince, Mohammed bin Salman, to enhance the role of women in Saudi society. Not only does it signify independence for women, it also acts as a crucial step in boosting the economy. This landmark change has opened a host of incremental opportunities for car manufacturers to make further forays into one of the biggest economies in the Middle East.

Previously, women were dependent on a male family member or, if affordable, a driver to escort them around, but the lifting of the driving ban has also lifted this dependency.

The desire to be independent and take charge of their lives is evident in the fact that – since the law changed in June last year – a quarter of women have already applied for a driving licence, and a significant proportion (61%) of those who haven't are intending to apply soon. Further to this, more than three-quarters (78%) of surveyed women who intend to drive plan to buy a car.

While there is a strong intent to drive, women who don't want to apply for a licence have concerns about safety and a general fear of driving. Despite the country launching a campaign to educate women on driving and create awareness about safety regulations, it appears more could be done to resolve the fears among the 30% of 'non-intenders'. This would boost the auto market opportunity further.

The norms of male guardianship are also shifting since the lifting of the ban. For most women, the decision to buy a car rests in their hands, which shows a real movement. Only 16% would have the purchase decided for them by their husbands or family members.

Of the women who intend to drive, the largest proportion state that they are more comfortable starting out with a small car that is easy to park in high-traffic areas and low on fuel consumption. Safety tops their list of high-priority features in a vehicle.

For those who have applied, or intend to apply, for a licence, back cameras and reverse-sensing systems are the most desired features in a car, with smartphone compatibility coming next.

Car makers should look at the key points to align their products and marketing campaigns, meeting the needs – but also the concerns – of the new female driver. Because of the issues of safety, manufacturers must focus on inspiring confidence among new female drivers to push intentions to apply for a licence and buy a vehicle that they are comfortable to drive.

**Kerry McLaren is head of Omnibus at YouGov MENA. Data was collected online by YouGov Omnibus from among 431 respondents in Saudi Arabia, between 6 and 13 August 2018, using YouGov's panel of more than six million people worldwide. Data is representative of the adult online population in the country.**

**A quarter of women in Saudi Arabia have already applied for a driving licence – and of those who haven't, 61% intend to apply**

**Among these new drivers, the majority (78%) plan to buy a car**

**One in five females does not think they will be a good driver**

**Safety being a prime concern, small-sized sedan cars are preferred by women drivers (16%), followed by medium-sized sedans (13%) and medium SUVs (11%)**

# Holding up a mirror

**Masculinity is undergoing a makeover, with a study from YouthSight providing clues to how Generation Z is driving this change**

The beauty industry must be very pleased with itself at the moment. After years of trying to diversify, men are finally wearing makeup and the male grooming industry is now valued at $50bn globally.

L'Oréal's UK managing director, Vismay Sharma, recently said it was no longer a taboo for men – as part of the "selfie generation" – to use cosmetics. He predicts that male-targeted makeup counters in chemists and department stores will be mainstream in the next five to seven years.

Regardless of whether or not you foresee a future for department stores in the next five to seven years, there is growing evidence that men in Britain take their appearance seriously. According to YouthSight's tracker, the State of the Youth Nation, 61% of young men say they try to look their best before leaving the house – which is even more interesting when only 56% of young women say the same.

We wanted to find out whether young men wearing makeup was a real trend or just hype. As part of our youth insight tracker, we found that, in 2018, one in 10 young men aged 16 to 24 wears makeup.

A cursory look at Asos reveals the growing diversity of male grooming products on offer. Glancing at its 'Face + Body' page, you will see makeup products from the likes of Mac, NYX, Nars and Laura Mercier listed alongside brands such as Bulldog, American Crew and Johnny's Chop Shop. Furthermore, UK brand MMUK (Men's Make-up UK) claims that 40% of its customers are in their teens or twenties.

Of course, men in makeup isn't a new thing. The pharaohs wore eyeliner, men in ancient Rome applied red pigment to their cheeks, and the Elizabethans wore ghost-white powder. It wasn't until the 20th century that men wore makeup as a sign of rebellion – think David Bowie, Prince and Boy George.

Today, however, makeup is less about subcultures and rebellion, and more about YouTube transformations and gender experimentation.

While young men and women both wear makeup to feel good, we found that males are more likely to wear it to express themselves and their creativity. It appears that it is an emotional and creative outlet for young men.

## Masculinity is polarised

The accepted mainstream has traditionally been positioned closest to hyper-masculinity, characterised by men with muscles, getting the girl and never showing weakness.

Masculinity is now polarised, however. From the rejection of 'lad culture' in the UK to the global #MeToo movement, many are calling mainstream masculinity toxic. Of course, not all men are hyper-masculine.

According to YouGov, only 2% of 18- to 24-year-old males identified as completely masculine when they were asked to rate themselves on a scale, compared with 56% of men aged 65 or over, suggesting a clear generational divide.

Mainstream culture does not accurately represent masculinity today. Although some young men in the UK wear makeup, and some identify with hyper-masculinity, the vast majority sit somewhere in between.

As a society, we need to discover how masculinity can be good again, especially as people aged 18 to 24 are more likely to see it as a negative trait than a positive one (YouGov).

As brands have helped redefine what it means to be a woman, they also have permission to rewrite what it means to be a man.

One place to start looking for solutions is fourth-wave feminism and its story of empowerment. You can be who you want to be, accept that people come in all shapes and sizes, and traditional gender stereotypes no longer apply to the modern world. These ideals are as relevant to young men as young women.

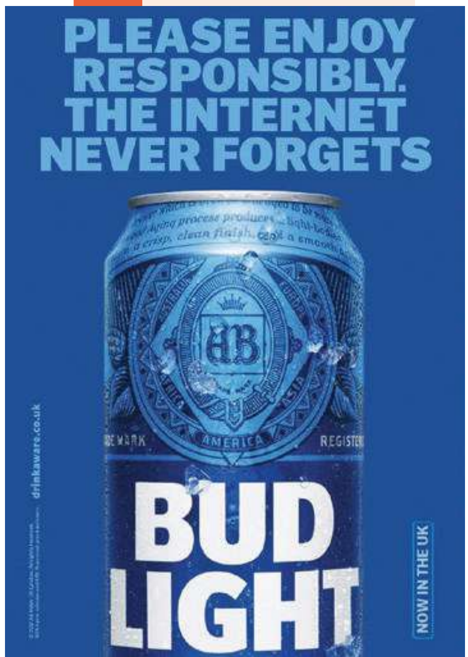
Brands should recognise that there is a sliding scale of masculinity – and that the majority of young men sit somewhere in the middle – and use their voices to make the middle more acceptable, comfortable and real.

They could also go one step further and think about uniting men around something other than masculinity, such as Bud Light's 'Please enjoy responsibly' ad, which used humour to mock modern life and succeeded in making a low-alcohol beer relevant to young people.

The stage is set for masculinity to get a makeover. I hope you are inspired to be part of the solution.

**Josephine Hansom is managing director of insight at YouthSight.**

**YouthSight interviews 1,000 16- to 24-year-olds every 60 days as part of its State of the Youth Nation tracker.**




**YouthSight's data on young men reveals that:**

- 34% have altered their personality to appear more masculine
- 63% have suffered with anxiety at some point in their life
- 63% have suffered with depression at some point in their life
- 36% feel pressure to conform to male stereotypes
- 31% have made inappropriate comments about women because they were around other men
- 74% have been told to 'man up.'

Young men are consequently suffering. Suicide is the biggest killer of men under 45, and, according to mental health charity Campaign Against Living Miserably, 84 men take their lives every week in the UK.

MARGINALISED VOICES

# The unusual suspects

**Researching the hard to reach is as challenging as it is important for charities, governments and brands.** Jane Bainbridge **looks at how market researchers are ensuring they hear the opinions of all sections of society**

At the end of last year, the UK had the ignominy of being told by the United Nations' special rapporteur on extreme poverty and human rights, Philip Alston, that its levels of child poverty were "not just a disgrace, but a social calamity", and that austerity was in breach of four UN human rights agreements. The government, predictably, disagreed with his findings.

Setting aside arguments about the levels of and reasons for poverty in the UK, people living on the lowest incomes are often overlooked in society and are in danger of falling outside many research remits.

There are various groups that can be deemed hard to reach – the disabled, the mentally ill, physically remote communities, the very elderly or indeed, the very wealthy. With 22% of the population living in households earning below average income, however – and 7% in persistent poverty (ONS figures) – those with very limited incomes make up significant numbers of those hard-to-reach groups.

Even the phrase 'hard to reach' is loaded, with many in the industry eschewing it for terms such as 'seldom heard', so the onus moves from the participants to the researchers. As one researcher says: "Most of the communities we're dealing with aren't necessarily hard to reach – we know where they are; we know what they do; we just have to go there and speak to them."

We need to get the terminology right and we need to ensure the voices and opinions of the marginalised are heard. While charities and policy-makers may seek their feedback, are brands to blame for market research not garnering the opinions of these groups? Jhanne Litson, head of casting for Flamingo, says the problem is broader than just brand investment.

"It starts with the brief," she says. "Many fashion or beauty briefs still exclude over-40s, despite this demographic being more independent and having more disposable income."

Viki Cooke, co-founder of BritainThinks, says it's too simplistic to say brands are only concerned about people with disposable income. The consultancy's briefs have included researching people living in fuel poverty, vulnerable customers for a water supplier, and low-income households for a restaurant chain.

"There are many reasons why brands want to hear from less affluent customers," Cooke says. "Some have a core base of low-income customers, while some have statutory or regulatory duties to engage low-income audiences. Others see themselves as purposeful companies and have well-developed cause related marketing schemes to support deprived households."

## Cultural inspiration

There are two things brands should consider: people's circumstances change, and they are still spending money on essentials and making choices – it's just that this expenditure may be a bigger proportion of their income than it is for the more affluent. "Scruffier, more chaotic and less affluent parts of society are the

"People are still spending money on essentials – it's just that this expenditure may be a bigger proportion of their income than it is for the more affluent"

source of much cultural inspiration, so it would be a mistake to focus only on customers who are currently considered profitable," says Cooke.

Researching marginalised groups may require a reassessment of what methodologies to use. Jayne Humm is head of research and learning at Local Trust, a Big Lottery-funded organisation that helps people make their communities better places to live. She says that, with the right methodologies, poorer communities aren't harder to reach.

"If you're going to knock on the door, they're much more likely to be in than anyone else," says Humm. "People in some areas might not be online very often – about a fifth of everyone who responds [to us] will do that on paper."

She feels focus groups aren't necessarily a good environment – "they're not just a disadvantage for people in poorer communities, but also for people who aren't as articulate, or who are shy and unused to being asked their opinions."

When NatCen researched the hidden economy (HE), getting people to take part was particularly challenging because of the sensitivity of the topic. David Hussey, the company's head of statistics, says: "We highlighted our independence, the purpose of the research and that it was confidential, to reassure respondents.

"We weighted the responding sample to correct for any obvious biases in the profile of people taking part. To ensure we did not systematically exclude people who were in the HE and worried about admitting it, at no point did we collect names or contact details from participants – and we combined two separate approaches: a telephone survey and a face-to-face one."

## Niche groups

While traditional focus groups may not be appropriate, the explorative nature of qualitative means it is preferred by many.

"Researchers need to be imaginative about what methods are used," Cooke says. "Relying on online methodologies excludes the one in 10 households with no internet access; holding fieldwork at awkward times can exclude those who can't afford childcare; and demanding lots of written contributions can be difficult for those with low literacy skills. Using multi-method approaches and being as flexible as possible can overcome some of these challenges."

Issues around quality of respondents are exacerbated for hard-to-reach audiences, adds Cooke. "The industry needs to be prepared to go out and find those who are not 'the usual suspects', even if it is more expensive and time consuming."

Girl Effect – the non-profit organisation empowering vulnerable and marginalised girls – created its own methodology in the form of TEGA, its mobile-based, peer-to-peer research app. Predominantly used in developing countries, it was also piloted in the US in 2017.

Zoe Dibb, senior manager of evidence, says: "We're trying to meet girls where they are, rather than use household surveys, which end up reaching girls' dads, so you don't get to speak to them directly.

"We created TEGA because there's very little data about those marginalised girls, particularly 10- to 19-year-olds. Girls in the community are trained as qualified researchers and the technology works in places where there may not be good tech infrastructure."

Girl Effect extended into developed countries when challenged by a funder to prove that one girl talking to another girl was effective universally. It piloted in Saginaw, Michigan – chosen because, in 2014, it was identified as the worst place in the US to be a woman, with high rates of crime, rape and gender-based violence.

Dibb says they assumed recruiting respondents would be easier in the US than in Africa because "everyone's got a mobile, everyone's on Facebook". Instead, they found high levels of mistrust and lots of doors being closed in their faces.

## Gatekeepers

Recruitment is a challenge cited by many when trying to reach the disenfranchised. Invariably, the answer is to partner with another organisation – which is what Girl Effect did with mentoring programme Big Brothers Big Sisters.

Dr Claire Bennett, head of projects for nfpsynergy, points to 'gatekeepers' being

really important. "It's hard to go in completely cold. We are at an advantage working with charities' networks, because there'll be some form of communication where someone says 'this is what the research is, and this is what we hope to learn from it'."

Local Trust has the advantage of going into communities with money for them, so there's a very clear reason to interact with the organisation. But Humm says it's still vital to earn people's trust. "Very often, these communities have been promised things in the past and it hasn't come off. If you're in a community that has been lied to, or left behind, you're not in the best

**“Many ‘real people’ don’t know that agencies like ours exist. Being clear and explicit on detail helps to build trust and partnership with those who aren’t often given a voice”**

place to be receptive to research – and often for good reason,” she adds.

Litson points to the fact that many people simply don’t know what market research is. “Trust is definitely an issue, so we need to build this slowly and maintain integrity,” she says.

“Many ‘real people’ don’t know that agencies like ours exist, or understand the complexity or breadth of the market research industry. Being clear and explicit on detail helps to build trust and partnership with people who aren’t often given a voice.”

When she was at NatCen, Bennett researched some very specific groups, including prisoners. The power dynamic there meant the prisoners had been told by prison officers that they must be part of the evaluation.

“You’ve always got to get informed consent and I’d say to people, ‘if you don’t want to be here, don’t be here; it’s OK; we can sit and chat and I’m not going to tell the guards that you’re not participating’. But sometimes you talk to people and then they change their minds and do want to talk,” she says.

This gradual opening up came to play when she was doing research for her PhD in lesbian asylum seekers. “People were talking about their experiences of sexual abuse and torture, which I never asked for, but people talked because they felt safe.

“Following a very rigid questionnaire isn’t going to work; it will disenfranchise people because they process information in different ways. It’s your role as a researcher to understand that quite quickly.”

## Shocking stories

For this research, Bennett sometimes needed translators. “You are very dependent on what the translator is saying. There are difficulties around LGBT asylum seekers because people come from communities that have a lot of homophobia – and even if an asylum seeker trusts talking to you, they may not want to talk to an interpreter from their country. So, often, you end up researching people who speak English.”

With difficult-to-reach communities, using members of that group to recruit others can be effective in boosting respondent numbers.

Opinium conducted research for the Finance Foundation into the ‘elder elders’ – those over 80 years old – and how they access money. It used its standard nationwide qual recruiters, but – to increase the sample – it asked respondents to invite friends over to their houses for the mini-groups.

James Endersby, managing director, says: “The over-80s are so under-researched. Some of them brought shocking stories to life of being financially scammed; others made us realise how we take for granted the fact that we can totter down to the ATM machine in 10 minutes for some cash.”

Opinium’s research is also a salient reminder that who falls into the hard-to-reach categories is fluid and changing. The young get old, the healthy get sick, people who had money can fall on hard times – and people’s vulnerabilities are often interconnected.

Cooke says: “Our view is that anyone is at risk, so our approach is not to identify certain demographic groups as vulnerable or hard to reach – but to always approach each audience with fresh eyes, and tailor an approach to engagement that best suits them.”

# The bicycle man

**Brompton folding bikes are the go-to for many urban commuters, but the company's CEO, Will Butler-Adams, is never satisfied. He talks to** Jane Simms **about product improvements, international expansion and why he manufactures in London**


"Come on, let's get you on the bikes," says Will Butler-Adams. The chief executive of folding-bike company Brompton is clearly not a man to be gainsaid – so, despite the rain, off we go, whizzing around the empty streets of the west London industrial estate where Brompton's factory and headquarters are based. It's exhilarating, especially the electric bike, Brompton's new baby.

The e-bike is the future, says Butler-Adams, describing it as the cycling equivalent of the smartphone. In Germany, the cycling bellwether, value sales of e-bikes have already overtaken those of traditional bikes. Brompton's version finally gained impetus thanks to a collaboration with F1 racing team Williams to develop an electronic drive system. Customers will definitely migrate from the non-electric version, he says, because – let's not forget – Brompton bikes are 'urban transport solutions', not exercise machines for "people wearing Lycra who enjoy sticking their arses in the air".

There's an uncanny similarity between Butler-Adams and another Will – the posh and very likeable intern in the BBC-spoof series *W1A*, who rocks up to Broadcasting House every day on his Brompton, folds it up, carries it inside, and stashes it by his desk. Butler-Adams shares his namesake's penchant for latte and words such as 'cool' and 'crap', and describes the 'Brommy' – which was invented by Brompton's brilliant and idiosyncratic founder Andrew Ritchie more than 40 years ago – as "a flippin' masterpiece".

*W1A* captured perfectly the kind of smug metropolitanism that Brompton ownership confers – cyclists nod to each other in recognition. Did the series help? "It was amazing," says Butler-Adams. "We had no idea it was happening, and we watched it and laughed our heads off." There was no resulting sales spike, but – at upwards of £900 a pop – a Brompton is not a knee-jerk purchase, he points out. "These moments of luck," as Butler-Adams describes them, just contribute to the trend of rising awareness and sales. Another such moment was a chance meeting at a lunch with ex-pro cyclist David Millar: "I'd no idea who he was. We got on like a house on fire, and we've been doing work together for the past three years; he's helping us engage with the MAMIL [middle-aged men in Lycra] community."

## Obsessive focus

Butler-Adams is the unofficial, yet undisputed, brand ambassador-in-chief for Brompton. Yet he's not a fan of marketing. "I'm an engineer; a lot of it's not my bag," he says. "We're not going to blow a million quid on some mega-marketing

**Original photography by** Will Amlot

**Will Butler-Adams joined Brompton as a 28-year-old and has worked his way up to CEO**

campaign, or sponsor some celebrity to ride around on a Brompton and pretend they like it."

Instead, the company lets the bike speak for itself – or, at least, its customers speak for the bike, and then repackage what they say on the website or YouTube. It also runs "fun" events such as the Brompton World Championships, which is characterised by a strict dress code – suit jacket, collared shirt and tie, and absolutely no Lycra – and has become so popular that entry is by ballot.

Despite his professed distaste for marketing, the company does, Butler-Adams says, "go to quite extraordinary lengths to find ways to give people confidence to own a Brompton". It recently launched a Barbour version aimed at urban fashionistas, for example, and has been plugging away at cycle hire for seven years – at £3.50 a day – to get people to try the brand.

But the main driver of Brompton's transformation from nerdy to cool, and from local to global (it exports to 44 countries and 80% of its sales come from overseas), has been the obsessive focus on the product and the customer. This leads to strategies that are almost anti-marketing. For example, so keen is the company for customers to love its bikes that it trains dealers not to sell them to people they don't think will appreciate them.

## Visionary

The long-term view seems to have worked. In 2002, when the 28-year-old Butler-Adams joined the company as project manager, after a chance encounter with the chairman on a coach, it was making 6,000 bikes, employed 24 people and – while profitable – couldn't keep up with demand. Today, it makes more than 45,000 bikes (it's aiming for 100,000 by 2021), employs 312 staff, and has enjoyed compound annual growth of 15%-20% for the past 16 years. The bike is still hand-brazed by skilled craftspeople, who stamp their signature on whichever of the 1,200 components they work on.

Butler-Adams has been visionary from the outset. He was an instant convert to the bike – "I'm 6ft 4ins; it's got these little wheels; I looked like a daddy-long-legs and my friends laughed at me, but I didn't care because it was so bloody useful" – and almost immediately recognised its global potential.

The factory was chaotic, littered with parts and pallets. "Andrew didn't throw anything away. It was heaving with his ideas, designs, prototypes, and it was not at all lean. I'd worked for Nissan in Spain, and Calsonic [Kansei], one of its first-tier suppliers, in Sunderland. All you are taught about at university [Butler-Adams got a first in mechanical engineering and Spanish from Newcastle] is best practice, and here was a company that – as far as I could see – was worst practice."

Once he'd got production working better, Butler-Adams started to concentrate on strategy. The IT was antediluvian, there were no management accounts or budgetary control, and Ritchie signed every single cheque. "We needed to start having meetings, but there was no meeting room, and Andrew couldn't see the point.

**At around £900 starting price, Brompton bikes are not an impulse purchase**

So I cleared out a room that was full of shite and went to a second-hand shop and bought the cheapest table and chairs I could find. We started having meetings, and I created a plan."

He called the plan '25k', that being the number of bikes he believed Brompton should be aspiring to make every year. Ritchie said it was impossible. "So even the ambition was lacking."

Though Butler-Adams insists he and Ritchie respect each other, the relationship remained fraught, even after he engineered a sort of management buyout in 2008 that removed all operational control from his former boss – and, when that didn't work, persuaded him to step down from the board in 2015. Ritchie, who remains the biggest shareholder, still regrets ceding control, according to Butler-Adams. "He thinks I'm not taking enough care of the engineering, that we are trying to do too much too quickly."

**"We are not spending millions making people aware – and, even if we did, one wonders if they would believe what we said"**

One thing that didn't upset Ritchie, curiously, was his protégé's early determination to develop overseas markets. It upset other people though – not least UK dealers, who couldn't get their hands on enough bikes to satisfy domestic demand. It was also less profitable than selling at home, given the need to use distributors. But he stuck to his guns: "I was confident we were going to make enough bikes, and I anticipated that, within four or five years, we'd have this factory pumping out bikes and UK demand would be fizzling out a bit."

The process is the same in every country, Butler-Adams says: early adopters get hold of the bike, attracted by its novelty value; the more they use it the more they love it; and then their friends catch on. But there's a four- to six-year incubation period before it gains the momentum it needs to reach critical mass. "We are not spending millions of pounds making people aware – and, even if we did, one wonders if they would believe what we said, because increasingly people don't believe what they're told, and rightly so."

His strategy has been vindicated by the period of strong sustained growth, but the approach isn't foolproof. Global trends, such as urbanisation and a rising middle class, prompted Butler-Adams to claim a few years ago that "if it works in London it can work all over the world".

However, China and the US – both key markets – have proved tough nuts to crack. Brompton has been in China for eight years, but progress is slow; despite a population of two billion, they are only selling 1,500 bikes a year there. This may be partly because of its super-premium positioning in China (it has a shop in Shanghai, close to Stella McCartney), which, admits Butler-Adams, "we find a little bit uncomfortable" because it is at odds with the brand's 'affordable' USP. Another reason is China's 'media wall' – consumers simply can't see the thousands of blog posts from around the world that play such an important role in spreading the word.

While the company is content to let things take their course in China, it has had to completely change tack in the US. The main problem was that the independent bike dealers it backed were being hammered by the online market and by other manufacturers forcing them to take stock they have at discount.

"Some of our best retailers were going bust," says Butler-Adams. What's more, he adds, the dealers in the US are so independent that there is no scale. "They are high maintenance; you have to talk to each one individually," he explains.


**Brompton is currently making 45,000 bikes a year and employs more than 300 people**

## Investing heavily

Brompton spent two years and lost quite a lot of money before retreating, retrenching and trying a different approach. It is now working with REI, a large outdoor leisure retailer, which provides national reach, economies of scale, and a sophisticated web platform. But there are risks, points out Butler-Adams, not least ensuring the staff can give the high level of customer service that is synonymous with the Brompton brand.

In October 2018, Brompton signed a similar distribution agreement in the UK with national retailer Halfords. "In London, about 4.5% of the population cycle, but 99% of us know how to ride a bike," says Butler-Adams. "Somehow the bike industry is

Keeping the factory in London was important for Butler-Adams although he doesn't rule out additional facilities overseas

not talking to the 94.5%." As he points out, most specialist bike shops are male, cluttered, intimidating – and off the beaten track. "We need to find ways to communicate with that huge market of people who don't consider themselves to be cyclists but who know how to ride a bike."

Having to outsource customer service is a risk here too, but Brompton is investing heavily in staff training. The opportunity gives access to whole new segments of customers. "Halfords does lots of work with the Caravan Club, for example, and it does a huge amount of business with the corporate market."

Butler-Adams is as sceptical about market research as he is about marketing. "We understand our customers by being the most obsessive customers ourselves," he says. When Brompton outgrew its factory in Brentford three years ago, it moved a few short miles to Greenford – at considerable expense – instead of taking advantage of significant financial incentives to go to Wales. "If we'd ended up on an industrial estate outside Cardiff or Merthyr Tydfil, we would suddenly have become a company making something for which none of us had any need," he explains.

**"Some of the girls were catching their tights on the folding pedals, so we've changed that. We get all these little insights all the time"**

"Many of us here use our bikes every day and we can see what's wrong. For example, the bell isn't good enough, it annoys me, we know we have to make it better. And some of the girls were catching their tights on the folding pedals, so we've changed that. We get all these little insights all the time." The company has always done some research on the international markets it targets, although Butler-Adams admits it's not very sophisticated.

Brompton would undoubtedly sell more bikes to city dwellers if it were safer and more pleasant to cycle. The average distance to work in London is 4.5 miles, and Butler-Adams believes the £20bn of taxpayers' money being pumped into Crossrail would be better spent improving the cycling infrastructure in cities around the country. Although he talks to the government and city mayors, he knows he must stay focused. "I'm maxed out trying to get a good product," he says. And he's perpetually frustrated. "Everything's sub-optimal here – we need better internal communications, better website content, more demo bikes, more mechanics. You name it. But if I stop being frustrated, someone needs to replace me – because if you are content with what you've got, you're not going to make it any better."

## Taking control

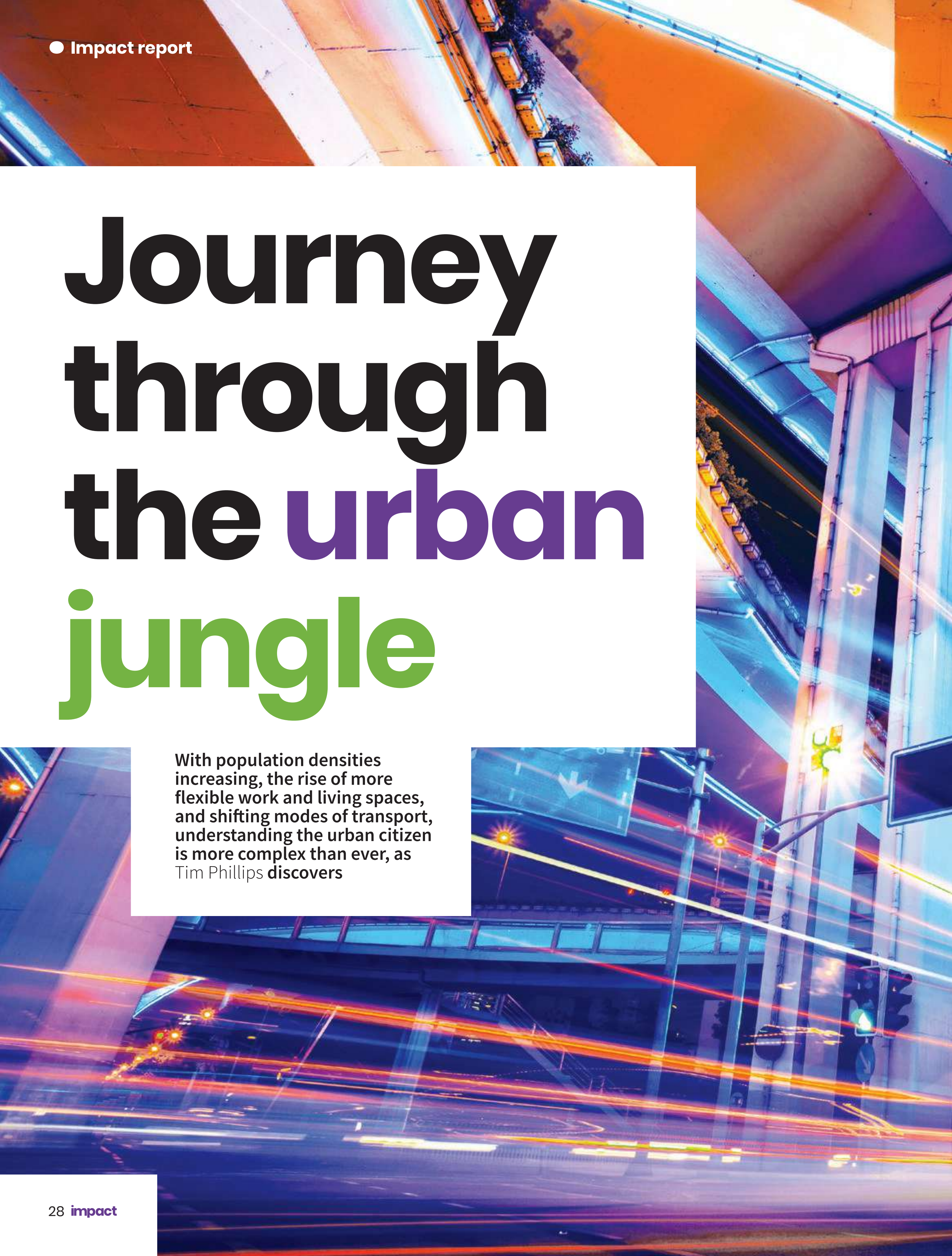
In the short term, Butler-Adams' focus is on managing the things he has control over, such as developing the e-bike, making the Halfords partnership work, and implementing the American strategy successfully. "Those things will make or break this business. Brexit won't," he says. On a "philosophical level" he believes the UK should be part of Europe – he has lived and worked abroad, he'd like his children to be able to do the same, and the people from other countries who work at Brompton enrich the company. But he thinks some businesses' hysteria over Brexit is ill-founded; instead, he sees it as a business risk that needs to be mitigated.

Longer term, he anticipates manufacturing overseas. "The measure of our success is our impact on society and if that means building a factory next to Shanghai, or some other mega-city, so that more people in Shanghai can whizz around on bikes, we'll do it," he says. "But that's proper long-term-vision stuff. By the way, we won't do that with this bike – the Brompton is a very special bike and I can't see it being made anywhere other than London."

In the meantime, he and his team will continue to graft. He's a fan of Warren Buffett's strategy of seeking steady, long-term, compound growth. "Chucking money, or even people, at it is not the answer. You can't accelerate it – unless you went out and raised £100m from venture capitalists, and they'd be bastards and I'd die of stress. Where's the fun in that?"

# Journey through the urban jungle

**With population densities increasing, the rise of more flexible work and living spaces, and shifting modes of transport, understanding the urban citizen is more complex than ever, as** Tim Phillips **discovers**



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In 1921, the British census started asking people not just where they lived, but also where they worked and about the journey that they took to get there. At the time, London was a city of six million people, three times the size it had been a century before. It was also a very different city, crisscrossed by a haphazard set of underground railway lines, built independently of each other by speculators and ringed by mainline stations, that the census discovered delivered 370,000 people into the centre of London every day.

The population of the historical City of London – the 'Square Mile' at the heart of the capital – had withered from around 130,000 in 1851 to a tenth of that figure by the time of the 1921 census.

If far-sighted Edwardian administrators (the US census didn't collect detailed commuting data until 1990) thought their statistics on how people went to work might be useful, it's unlikely they imagined the detailed analysis to which their records would one day be subjected.

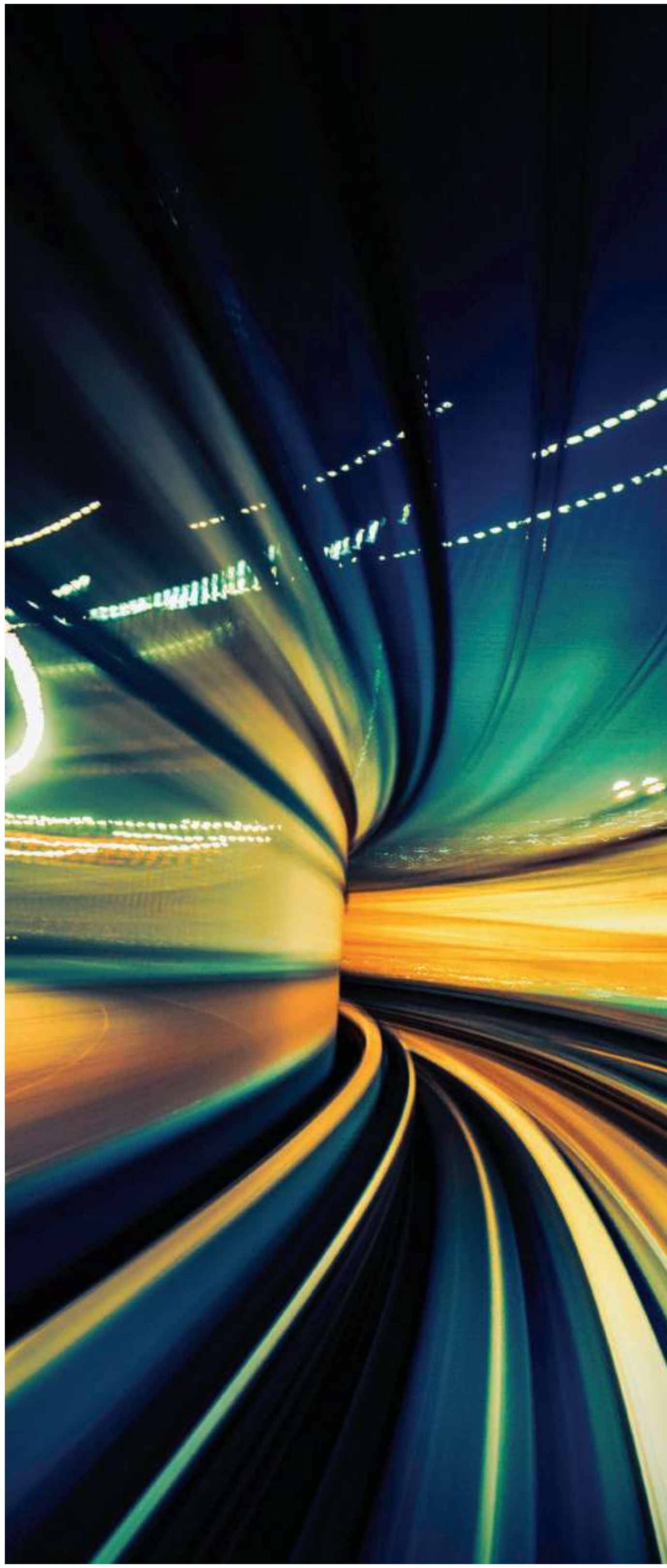
Professor Steve Redding, an expat Londoner at Princeton University, has used this commuting data to build a sophisticated model of urban growth that predicts: where people will live and work; property values; and commercial sector growth. Using this model, he has concluded that the pattern of London's spectacular growth in the second half of the 19th century was almost entirely because of the availability of underground and overground railways.

## Suburban living

"Our model can explain all of the dramatic separation in the number of people who live and work in the City of London during the course of the late 19th century," he says. If the model removes the entire railway network in 1921, London's population would have been just above two million. So urban transport is "essentially explaining nearly all of the growth in greater London over the 19th century".

This isn't just academic history; the model created by Redding and his colleagues can explain the growth of most major cities – even today. The invention of suburban living, the dense clusters of industry and other types of specialist jobs, and high-rise buildings that make the most of the limited room in urban areas to expand are – to a large extent – the consequences of transport. But now city planners are grappling with a new set of problems.

As our cities and tastes change, so does our demand for transport – and planning services with different managers and owners (both public and private) using different pricing and ticketing plans, while deciding which infrastructure needs investment and which passengers get priority, is a major headache.



Transport for London (TfL) has a particular problem. "Our drop in trip numbers has been going on since 2015," says Ian Pring, TfL's research and insight manager. "It's consistent with the social and technology factors that we see, such as home shopping and home entertainment. There's just as much shopping going on, it's just that people don't travel so much to do it."

After decades in which TfL and city planners were exercised by the problem of how to accommodate consistent rises in passenger numbers, tube use was down 2% last year, and bus use has been falling for four years. The London Travel Demand Survey shows that Londoners travelled 2.2 times a day on average in 2016/2017 – 20% less than in 2006-2007. Commuting trips in the period are down 14%.

As a result, TfL faces a funding shortfall. It is also grappling with what Pring understatedly calls a "stretch target", set by the mayor of London, that 80% of all journeys in the capital be made on foot, by bike or on public transport by 2041. Currently, the indicator hovers around two-thirds and is stable. But the challenge of encouraging behaviour change has

**"Planning services with different managers and owners (public and private), using different pricing and ticketing plans, is a headache"**

## Does dockless bike-sharing need a plan?

**In early 2018, spectacular aerial pictures started appearing on the internet of bicycle 'graveyards' in some of China's cities, made up of thousands of abandoned, brightly coloured bikes. The over-expansion of the dockless cycle-sharing market seemed to perfectly demonstrate what happens if you let the market decide how to improve urban mobility without a central plan.**

Those bicycle graveyards still exist, but recent research by Ginger Zhe Jin, a professor of economics at the University of Maryland, suggests competition is a good thing if we want more people to cycle. The key is to let the 'network effect' work: the more that people use a service, the more useful a service is (think: Airbnb). But how can this apply to bikes?

Jin and her co-authors studied what happened in 59 cities in China when Mobike and ofo, the two largest dockless bike suppliers, competed. Conventional wisdom runs like this: the companies oversupply the market and drive prices down; one firm is driven out of the market and abandoned bikes pile up; the remaining provider raises prices; and fewer people end up cycling. Instead, "we observed not only higher prices and higher sales, but also higher investment and higher bike utilisation," says Jin.

The network effect of two competing providers means it's more likely that people who need bikes will find one in the place they need it. More availability means that bikes become more useful, so the hire price stays the same or creeps up a little. And because it's easier to find a bike, more people cycle.

"Our findings suggest that the reality is much more complicated than winner takes all," says Jin.

**Cao, G, G Zhe Jin, and L-A Zhou (2018), "Market Expanding or Market Stealing? Platform Competition in Bike-Sharing", NBER working paper 24938.**

led TfL to engage increasingly in qualitative work, cultural analysis and semiotics, to understand why people choose to travel at particular times – in particular ways – and to investigate what a 'good' journey would be.

## Pain points and irritations

As it seeks to 'win' market share, TfL's customer directorate – which brings together marketing, planning, technology and data – is analysing trip choices using Porter's five forces model.

The most spectacular growth in travel in London has been in private hire vehicles, up 75% in four years. It's one thing to know more people are taking an Uber; it's quite another, however, to work out what would encourage them to take a bike or a bus instead.

TfL has introduced an approach to measure not just the journey time and punctuality for commuters, but how those commuters felt when they were travelling, and whether they would trade a slower journey for a more comfortable one.

This type of analysis has also been at the heart of research being conducted in 10 cities, across eight countries, by Kadence International. Its goal is to find innovative ways to change the way we travel in cities, to remove the pain points, irritations and even dangers that urban dwellers – now more than half of the world's population – learn to put up with while travelling around a city.

Kadence wants to find new ways for its clients to create products and services to match the aspirations of people who, increasingly, have the choice to work, get their shopping and entertain themselves without leaving the house. The auto sector has noticed. Kadence client Jaguar Land Rover, for example, has created InMotion Ventures, an investment and innovation spin off focusing on non-traditional areas, such as ride-sharing, mobility as a service (MaaS) and autonomous vehicles.

"There's a lot of research into infrastructure and at the legislative level, but very little that actually asks people about their feelings and what they can tolerate," says Greg Clayton, managing director at Kadence International. "We have found that this experience is very city-specific because it depends on the infrastructure. Urban mobility solutions depend on the type and size of city, but also on the existing infrastructure."

The day-to-day reality that Kadence's research is uncovering suggests that, for most of us, the subjective quality of moving around in a city has not really improved since the census of 1921. "The first thing that struck me about the responses we got was the resignation. This is one of the main impacts on people's wellbeing," says Gabi Clark, who has been coordinating the project at Kadence. "There's always been a perception about mass transport that it's herding cattle."

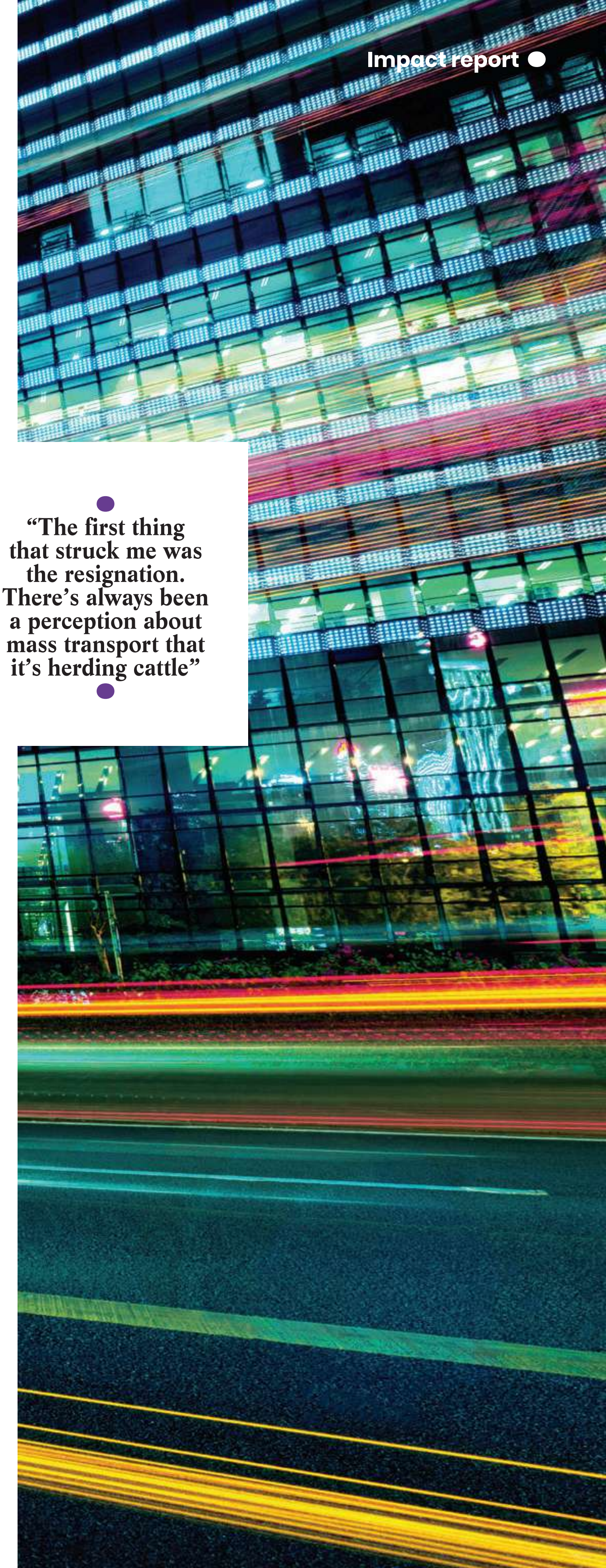
## Low expectations

Lack of etiquette and consideration are cited as annoying factors in every city. "From Jakarta, where they're talking about crazy drivers, to Delhi, where it's rude people, and Boston, where one person spoke at length about people using their phones and not looking where they're going," said Clark.

Even if the problems vary, however, it is still possible to find common trade-offs that can be applied globally, Clark explains. "Would they trade comfort for time? Safety for comfort? A surprising factor is that comfort is actually very important. Expectations of comfort are currently so low that it wouldn't take a lot to exceed them. A route-planning app such as Citymapper is about getting from A to B in the most efficient way. How about a route that takes you past a Starbucks? It's the small things, but they make a difference. If you can't change the infrastructure, this would improve the human dimension."

For most people, a lack of innovation in the quality of public transport and mass transit is a problem of comfort and convenience. For others, it represents a life-restricting lack of inclusion. Work by Opinium, on behalf of Scope, into the obstacles faced by disabled transport users vividly illustrates the size of the barriers that even basic urban mobility presents.

The research had three phases: it contrasted large samples of disabled people and a nationally



**"The first thing that struck me was the resignation. There's always been a perception about mass transport that it's herding cattle"**

# Bigger than the internet

**While the original electric scooter – the Segway – was deemed clever, but uncool, the opposite is true of e-scooters. These are currently very cool indeed. Around the world, e-scooter hire services are growing at rates that make other mobility services seem sedate: both market leaders have reached 10m rides much faster than Uber or Lyft.**

Market leader Lime did not release a scooter until the beginning of 2018, but has investment from Google's venture capital arm. Its competitor, Bird, launched in late 2017 and has scooters in Paris, Vienna, Tel Aviv, Brussels and many US cities. Both companies are valued at more than $1bn.

One reason for their success has been joined-up thinking. For example, you can use an Uber app to locate Lime scooters in more than 100 cities in the US and Europe, thanks to a partnership.

Bird is trialling a concierge service to deliver e-scooters to customers' houses by 8am so they can travel to work, while Taxify has already become the first taxi app to include scooter hire as a service in Paris.

**"While there were some positive stories of assistance, the overall perspective was of alienation and infrastructure-based discrimination"**

representative sample to find out attitudes towards and experiences of using public transport. In the third phase, it examined the disconnects between the two using a diary study of 27 people with visible and invisible conditions or impairments. The quant showed disabled travellers were 10% less likely to take a train and, among them, 18% of 18- to 34-year-olds said travelling less than they would like had prevented them from going to work or finding a job.

## Alienation

The qual work, however, captured the experiences and emotions associated with urban mobility for the disabled. "One woman had almost fallen in the gap between the platform and the train, trying to get on. She talked about being mortified and terrified," says Wez Eathorne, research director at Opinium. While there were some positive stories of help and assistance, the overall perspective was of alienation and infrastructure-based discrimination.

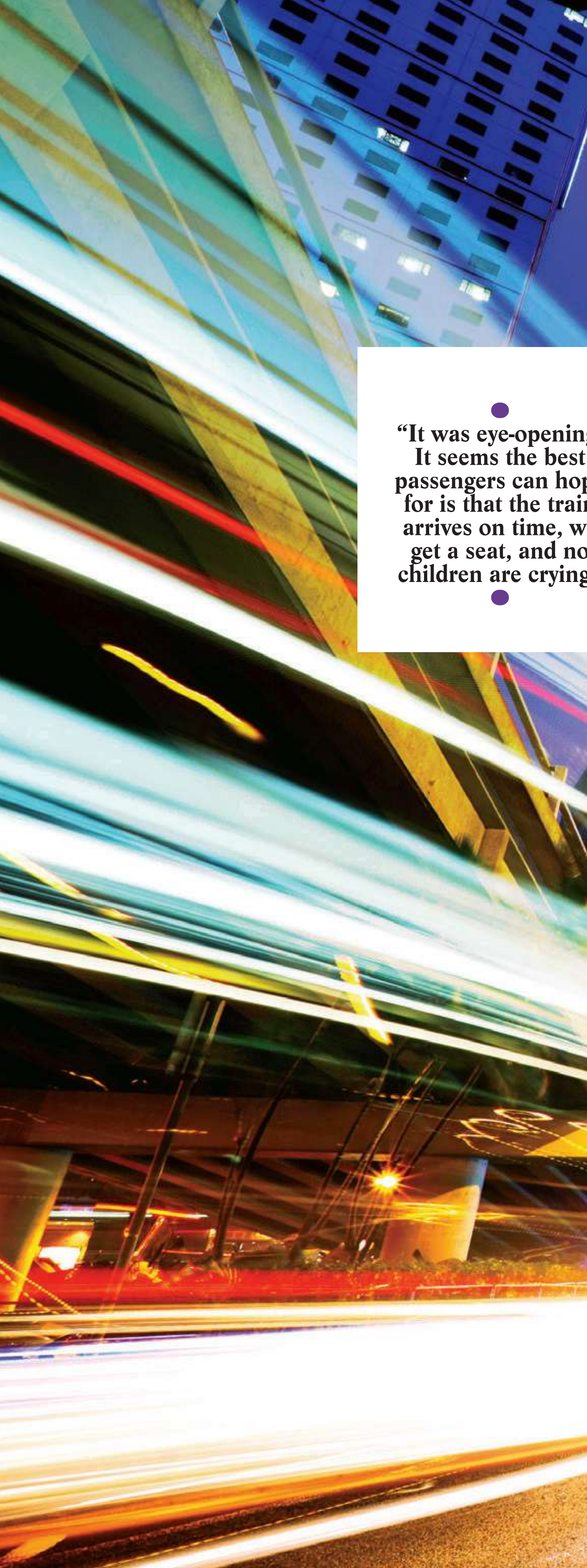
"We did a case study with someone who is incredibly successful in life, but when she takes public transport, the staff refer to her as 'a wheelchair'. They say, 'I've got to put a wheelchair on' – in front of her. This isn't something for Scope or the government to solve – it's got to be people working in collaboration."

Opinium's research also highlighted that, while ageing transport infrastructure presents many problems – for example, no wheelchair ramps on trains – experiences for disabled travellers could be improved considerably with training, service design and creative thinking. "It would not be expensive to create an app, that everyone could access, to let transport companies know you'll need support to get on the train in an hour's time," says Eathorne. "The fact that it doesn't exist is quite baffling – it seems like a really easy win."

The joined-up thinking that these changes imply may not be instinctive in the management culture of transport companies, which have traditionally competed with each other and prioritised service-quality metrics about engineering over passengers.

Southeastern, which funnels commuters back and forth to London from 173 stations every day, is attempting to rethink the way it provides its service. In a 2014 Which? survey, it was the lowest-ranked rail company in the UK for customer satisfaction, with only 40% of commuters saying it ran a good service. The company made headlines with its response after claiming that the poor result was because it "takes people somewhere they don't want to be with money they don't want to pay", and that it would be different if the survey had been done on a sunny day.

Instead of focusing only on the indicators that managers look at – such as punctuality, reliability or



> **"It was eye-opening. It seems the best passengers can hope for is that the train arrives on time, we get a seat, and no children are crying"**

numbers of people using the service – Howard Barr, head of insights at Southeastern, created focus groups in the summer of 2018 so passengers could talk about their commuting experiences. From behind one-way glass, company managers got to hear the good and bad experiences. "It was eye-opening for them; it seems the best we can hope for is that the train arrives on time, we get a seat, and no children are crying."

Passengers spoke about the entire journey – planning, parking at a station, finding a toilet, and managing stress by being able to find out if their train had left the previous station. Barr argues that transport companies could consider each journey in its entirety, as a service to the customer, not as a set of discrete hops using different modes of travel.

## Digital transaction

In exploring the "pain points and moments of truth", one aspect of UK train travel was highlighted that shows transport is still seen by rail companies as a set of processes handled by different departments or companies, rather than as a service. "Why does buying a train ticket online give you a 12-digit code, which you then have to put into a machine at the station, which spits out a tangerine paper ticket?" Barr laughs. "This is not what our passengers would think of as a digital transaction."

Similar questions mystify Sian Gannon, chief operating officer of Tomorrow's Journey. The B2B start-up was established to create incentives and ways for urban transport companies to cooperate, improving efficiency, but also allowing them to move away from this tangerine-ticket, siloed thinking. One of its first projects has been working with a rail operator to think about how the entire journey could be made better for customers.

"How does a traditionally competitive industry learn to collaborate? How do we get people to feel comfortable with sharing," asks Gannon, who cites the example of "a leasing company with 100,000 vehicles, and a vehicle service provider that can't get into a market because of the high cost of entry." All the better if those vehicles are offered at a train station and the lease is included in the price of a rail ticket.

However, some sharing-economy solutions to transport problems are inefficient, Gannon points out. An extreme example would be the 'bike graveyards' that have appeared in Chinese cities as a result of thousands of unwanted rental bikes piling up by the road (see panel, page 31). Another example is a service that rents cars by the hour. "When a new mobility service comes to a city, it parks 10 new cars next to 10 vehicles owned by an existing mobility

service provider," says Gannon, who believes it would be better if there was an incentive for the providers to share a common pool of cars.

## Crowdsourced data

One way in which joined-up thinking can evolve is by crowdsourcing. Transport app Waze began in Israel 10 years ago, was acquired by Google, and now has 110m users around the world, 2.5m of whom are in the UK. It aggregates crowdsourced road data, submitted by drivers to help optimise journeys. "The more people who use it, the better it is," says Finlay Clark, UK country manager for Waze.

The firm has partnerships with 700 transport authorities around the world. "We don't charge them; we just ask them to tell us about roadworks and major traffic events," says Clark. "Crowdsourced data is now the number one way that TfL gets information about the state of its road network."

Waze maximises the benefit to drivers so as many as possible continue to contribute data. It could ask motorists to create a complete and accurate picture of potholes in the cities it covers – but it doesn't because there's no indication that authorities would act on the data, so the insight wouldn't help users.

Waze has been controversial; in some places, residents have been surprised by sudden increases in traffic as the local Waze community simultaneously discovers that their street is a time-saving 'rat run'. But it is also a continuous driver survey that can help improve the decision-making of planners in non-obvious ways. "Some authorities use the data to decide on signalling, others to decide which highways should be built – some even use it to decide on pedestrianisation," says Clark.

In October 1937, *The New York Times* reported on a novel experiment in Chicago, in which a cyclist beat a taxi, a train, a car, a bus, a pedestrian and a streetcar through heavy traffic. The digitisation of transport data means this experiment is replicated in every city, millions of times a day, captured by smartphones and driver apps.

Taxify, a competitor for Uber and Lyft, has concentrated on harder-to-reach markets, with an emphasis on data science to optimise its on-demand taxi service. Today, on-demand rides make up 2% of all rides in a city, but Taxify estimates that this proportion will increase to one-third by 2025, because efficient routing will encourage travellers to share rides – a sort of on-demand bussing, especially in places where public transport is limited or unreliable.

The Taxify team uses machine learning, mathematical modelling, operations research and game theory to optimise what it provides. This isn't just about pushing more people to use cars, however; it also means learning to respond to different needs, and offering services to match.

"Taxify has been successful with motorbikes in Africa; we were also the first ride-hailing platform to launch scooters," says Taxify data science team lead Andre Karpištšenko.

"In the future, every ride could begin from one platform. Some rides make more sense on a bike or scooter, some in a car. It would be perfect to have one app that combined them all."

## Urban Mobility 2020 – letting the citizen speak

**More than half (55%) of the world's population lives in cities – a figure that's widely expected to rise to 68% by 2050. Getting around increasingly busy and crowded conurbations is a challenge that unites citizens everywhere, as difficult journeys can have a significant impact on economic productivity and individual wellbeing.**

Equally, the sector represents tremendous commercial opportunities for many of Kadence's clients – from established automotive manufacturers to disruptive new mobility service providers; from financial service firms to energy companies; and from fashion brands to telecommunications platforms.

Urban mobility, however, means something completely different depending on where you are in the world. Solutions are heavily contingent on historical infrastructure and regulation, so each city represents a unique identity – and that's before we talk about climate, market maturity and cultural nuances.

Data in this area is not lacking; valuable and comprehensive studies have been conducted on urban 'readiness' for future-proofed mobility solutions, while there is an abundance of transactional and geospatial data detailing people's movements.

But what about the citizen perspective? When is this voice heard? How do these people feel about their travel experiences, and do their views align globally?

To address this surprisingly overlooked audience, Kadence has undertaken a study exploring urban mobility from the citizen perspective in 10 contrasting cities. These map largely to our company footprint – Los Angeles, New York, London, Berlin, Mumbai, Shanghai, Hong Kong, Tokyo, Singapore and Jakarta. With more than 5,000 interviews, and a wealth of visual stimulus gathered from our local teams, we will gain hitherto unrivalled insight into the urban citizen's travel experiences.

We will provide detailed commuter journey profiles and assess commuting pain points, as well as showcase reactions to groundbreaking urban mobility concepts. We will also develop and deliver a global segmentation, based on people's urban travel preferences and life values. These will be used to understand if – despite the cities' many differences – there are universal needs among urban travellers around the world.

Kadence will hold its global launch of Urban Mobility 2020 on 7 February 2019. The event is being held at – and in partnership with – the London Transport Museum in Covent Garden. To attend, please register at **www.kadence-urbanmobility.com**

**By Greg Clayton, managing director, Kadence International**

**For** Catherine Hunt**, head of insight and evaluation at the Cabinet Office and Prime Minister's Office, harnessing the government's collective intelligence is essential to helping it understand its citizens. By** ***Katie McQuater***

# Hive mind

"If you could create a hypothetical room where all the brains working in insight and evaluation across government sat together answering questions, wouldn't that be amazing?" muses Catherine Hunt, head of insight and evaluation at the Prime Minister's Office and Cabinet Office, who has spent a large amount of time figuring out how to create just such a vault of collective intelligence. Crowdsourcing knowledge from across government and its agencies isn't simply about being efficient, however – "because these are hard problems, and there isn't a simple answer", adds Hunt, who has had an unconventional route into a senior government insights role.

**"It's a fascinating time to be listening to public opinion and finding a way to boil it down into impactful recommendations"**

Her journey began when she applied for the Civil Service Fast Stream, to keep a friend company – although she didn't take the job at that point. After a law degree, a few years working in strategic planning in the ad industry, and leading insight for Harper Collins, Hunt felt that her business with government wasn't quite finished (both of her parents worked in local government).

So she took a role at the Central Office of Information to improve evaluation in government, later moving to the Prime Minister's Office and Cabinet Office communications. After a career break with her family in New York, Hunt returned to the government in the summer of 2016, a month after the EU referendum. "The Brexit vote happened in my last week in the States," she says. "Three years out of the country and I thought: 'Blimey, that was unexpected.'"

More than two years on, how is Brexit affecting her work? "It's difficult and it can be sobering – but it's a fascinating time to be listening to public opinion and finding a way to boil it down into impactful recommendations for government," she says, adding that Brexit has highlighted the importance of people working in research not getting caught up in their own bubbles.

"We got where we are because people like us didn't listen to people who were not like us."

Hunt's role spans three main areas. First, insight: understanding public mood, attitudes and reaction. Second, the evaluation of government campaigns, including any worth more than £100,000, which must go through the 'pass process' looked after by her team.

They also oversee best practice, and work with departments to set standards for insights and evaluation across government. This is an important role because, while some departments – such as the Department for Work and Pensions (DWP) – have large insight teams, others might have one person working on a part-time basis.

As part of the Government Communication Service's (GCS's) wider Engage programme, which looks to ensure campaigns are data-driven, backed by research and, ultimately, more effective, Hunt is involved in Basecamp. This cross-government network began life as an insight and evaluation hub, but has grown to around 540 members in various roles across government.

She also chairs a regular insights and evaluation forum for those heading insights in government and its arms-length bodies. "We all work for the same employer – the Crown – but in different organisations; we don't have a common intranet," explains Hunt. "It's a bit like a sci-fi film; every time you pick something up to look at it, someone in a parallel universe is looking at exactly the same thing – if only we both knew about it."

**"It's always been our job to tell stories using data, but now... every comment someone makes on social media is a bit of qual data"**

In addition to driving efficiencies, Basecamp is able to highlight that best practice sometimes comes from someone in a small organisation who has engineered an innovative approach to a problem. The platform allows them to talk around it and see where others could benefit from a similar approach. People can share their content and insights, so "it's not just a single version of the truth", says Hunt.

An obvious downside to sharing platforms is that championing transparency and accessibility for such a broad group of people can mean losing depth and specificity, as some sensitive

# CV

## Catherine Hunt

**2016-present:**
Head of insight and evaluation, Prime Minister's Office and Cabinet Office

**2012-2013:**
Senior communications adviser, Prime Minister's Office and Cabinet Office

**2009-2012:**
Communications evaluation consultant, COI

**2005-2009:**
Head of media and insight, Harper Collins

**2003-2005:**
Planning and research manager, UKTV

**2001-2003:**
Senior brand planner, News International

**1996-2000:**
Advertising executive, Thomson Holidays

information can't be shared. In November 2018, the government launched its Knowledge Hub, formed from Basecamp, that allows 'sub hubs' to be added so more detailed information can be shared on specific campaigns, departments or areas of interest. Hunt has been working with the Market Research Society to include content on the hub, to help those commissioning research within government, as part of MRS's policy work on procurement best practice.

The hub includes functionality that enables the government's media agency, Manning Gottlieb OMD – which took up the contract in November 2018 – to share results. Standardised metrics, used as part of wider GCS efforts to regularise evaluation across government, are coupled with digital dashboards within Knowledge Hub, and allow "proper benchmarks" for campaigns for the first time, according to Hunt.

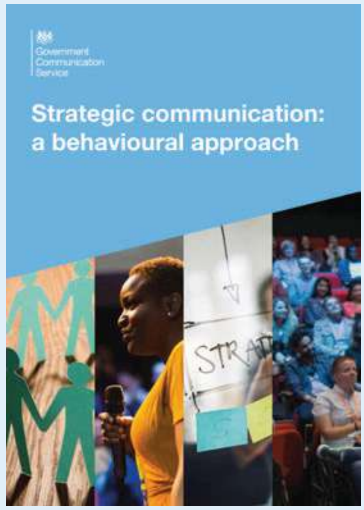
"We've standardised categories of campaigns, which will enable you to ask, over the next couple of years: 'What does 'good' look like?'; or 'I'm trying to reach young people, where should I go and how should I do it?' It moves beyond being just a community for us – it's a community where we work collaboratively with our media agency.

"Our role is to make sure that all government comms is as efficient and effective as possible – and to do that, you need to know what is good."

## Mapping data

GCS has developed an interactive mapping tool that gives localised insight – based on data at a local authority level – to government professionals for campaign planning. This could, for instance, be someone working in a ministerial events team who is thinking about the best location for an

**Hunt's team works to set insights and evaluation standards across government**




# Good behaviour

**The Government Communication Service's professional development team has produced a new set of guidelines for behavioural change, using some of the core principles of behavioural science combined with existing best practice.**

Written by Laura de Molière from DWP's behavioural science team alongside Catherine Hunt, the Health and Safety Executive's Lester Posner and David Watson from the Department of International Trade, the guide has been updated following feedback that while the government's behavioural science principles were being well applied in large campaigns, people struggled to know where to begin for smaller ones.

The guide sets out how to set objectives and use audience insight using the Com-B model, which says there are certain conditions that need to be met before behaviour change takes place: the first is capability, which relates to whether people have the right knowledge, skills and ability to make the desired change in behaviour.

Secondly, is the opportunity there for people to change their behaviour? This could be physical or social opportunity, looking at whether an audience has the right resources, systems and people around them to help them make changes.

Lastly, if the government wants people to change their behaviour, it needs to look at their motivation – whether they actually want to do something and have the right habits to be able to do so.

When creating and implementing a communications strategy, the guidelines suggest asking the following questions using the EAST model (easy, attractive, social and timely).

"We worked hard to translate the theory into something simple and practical," says Hunt. "It's about trying to find a way of boiling down the simple principles of Com-B into a set of simple principles anyone can use, so even if their activity is 5% better, it makes a difference."


**The GCS's guidelines for behavioural change use the Com-B model**

announcement benefiting working families. "The tool allows a non-data specialist to blend data sets together on a UK map to identify places in the country against two or three criteria," Hunt explains.

While new technologies help make such tools and a wider array of data sources possible, the storytelling aspect is down to the researchers.

"It has always been our job to tell stories using data, but now you have so much data – every comment someone makes about you on social media is a bit of qual data. You can test reaction overnight; you can marry real-time digital data with real-time polling data and know within a day how something went down. So you've gone from not enough data to potentially too much."

Hunt believes this can be tackled by not falling into the trap of analysing everything just because you can. For example, the government is looking at how it uses textual analysis to interpret large-scale qual, but Hunt is aware of the dangers of relying on certain social intelligence tools, as they don't understand nuance such as sarcasm.

"Some of the things that made us good researchers years ago – develop and test a hypothesis, guard against bias, make sure it's representative – are still the same things that make us good researchers now."

## Different priorities

Constructive dialogue is key for Hunt when comparing the value of quick turnaround approaches versus long-term research with her colleagues in social research, who often work on long-scale evaluation and address big policy questions. Her priorities as a market researcher are more pragmatic.

"Through the evaluation framework we've created, and the segmentation we run, if money is spent 10% more efficiently, then we are spending public money more effectively and efficiently – that's got to be a good thing.

"It's about those constructive conversations where you realise that you need something different – both methodologies are often totally right. Quick turnaround to make something better, and long-term robust formative research are both really important."

Hunt is also working with her analysis colleagues on the research marketplace, which relaunched in 2018. The new framework for market research procurement intends to create a more flexible pool of suppliers, of different sizes, and reflect how the industry is shifting.

"We recognise that things are changing so quickly that we might not realise what those things are – and we recognise that any framework that closes down agencies and limits the number they can be on just makes it harder for small agencies."

Hunt's pragmatism extends to her own position, and that of her colleagues. Discussing the role of insight within government in future, she says: "We are only here because public money is paying for us to be here – and our job is to be the voice of the people who pay for us to be here. Brexit really made that clear."

If researchers strike the balance of using that opportunity while not forgetting the basics of research, Hunt believes all will be well.

"As long as we don't just disappear down a rabbit hole of using data to prove what we want to prove, I think it's good," she says.

"As long as we are really clear that the reason we are here is to be the objective voice of people who are not us. And if there's ever been a time when that's valuable – not just in the UK, but across the western world – it feels like now."

# A brewing chal

**Japanese brewer Asahi owns a portfolio of premium beers, and in this competitive environment insight is a central pillar of its business strategy. Rob Gray talks to global head of insight** Paul Thomas


This is Paul Thomas's first day back in Asahi Europe's Woking head office post-honeymoon and, unsurprisingly, he appears sun-kissed and relaxed. Once we settle down to chat, however, there's no doubt his mind is fully focused on the many business opportunities that enticed him to join the brewing group as global head of insight in May 2018.

Thomas was approached for the role after three years at drinks giant Diageo, where he held insight and innovation roles. There, he brought a new variant of Tanqueray gin to market – Flor de Sevilla – which has the bitter-sweet flavour of Seville oranges. But what of the challenges facing Asahi?

'Challenges' is the operative word because, although placed among the world's top 10 brewing groups, Asahi is dwarfed by beer behemoths such as Anheuser-Busch InBev, Heineken, Carlsberg and Molson Coors.

"We are absolutely a challenger brand," says Thomas, "and we have set some pretty lofty ambitions about becoming what we call a 'global premium beer powerhouse'. We are very selective in choosing where we play and we are focused on becoming a really strong No 1 or No 2 player in all the premium beer segments."

These ambitions come on the back of a massive amount of change for Asahi over the past couple of years. In October 2016, it completed the acquisition of Miller Brands UK, bringing premium beer brands Peroni Nastro Azzurro, Grolsch and Meantime into the fold. Then, at the start of this year, the company announced the relaunch of its eponymous Asahi Super Dry beer in its 'authentic form'.

The beer had been brewed under contract by Shepherd Neame, Britain's oldest brewer. With the backing of its parent company in Japan, however, Asahi took brewing of the brand back in-house, and switched to the original recipe and production processes renowned for delivering a uniquely dry, crisp taste most precisely described by the Japanese word *karakuchi*.

These changes allowed for the repositioning of Asahi Super Dry in Europe as a premium brand – and it is with this focus on premium beers that Asahi Europe differs from bigger rivals, as well as its parent in the Far East.

"At Asahi Europe, we are responsible for Asahi, Peroni, Grolsch, London Meantime and all the variants that sit under those, anywhere in the world where they are considered a premium brand," says Thomas.

"As an example, Asahi in Asia is a mainstream brand, so that is looked after by the Tokyo office. Peroni Red – the biggest beer brand in Italy, I believe – is a mainstream product, so, again, we don't touch that. But where those four brands are premium, this is the headquarters.

**"Having a superlative understanding of the the customer will lead to bigger and better ideas. We have to be smarter"**

"We have a very good working relationship with Japan and one of the reasons they decided to almost outsource the premiumisation of Asahi throughout the world is that they realised they had the opportunity to draw on the expertise of some of the people who'd worked towards making premium giants of Peroni and Grolsch."


A "challenger mindset" is engrained in the business and conveyed in major external presentations given to explain what the business stands for. That mindset is built on four pillars, the first three of which are: unleashing the right portfolio (working out which of the products is right for which market); executing everything to the highest possible degree; and employing the right people. The fourth pillar is insights.

"It's quite rare for a big company to have insights within slide two of its company presentation," says Thomas proudly. "We are very clear that having a superlative understanding of the consumer and the customer will lead to bigger and better ideas. If we just get in the same insights as, say, Heineken, they are going to win, because they have a lot more money to spend on 'above the line'. We have to be smarter."

That quest to be smarter led to the creation of global insights, which Thomas leads. The function sits within global marketing and one of its key roles is to ensure the ethos of consumer insight permeates across the business. Thomas wants to make Asahi's marketers as curious about consumers as its insights team is.

Global insights is "deliberately lean", at only three-strong, but there are around 20 more insights people in local teams prioritising the UK, the Netherlands and Italy. Not having the biggest team means wringing incremental value out of every person to achieve success. Historically, local teams were very self-contained. Among the tasks Thomas faces are building better networks between the teams and striking the right balance between local and global insight.

"The local teams have real local expertise and knowledge. They know



which suppliers are great quality. We need to share knowledge. It's not an us-and-them mentality, or a master-slave thing. It's a partnership."

Getting insight right matters because there are many tricky issues to address. Beer sales in Europe are in decline, with people drinking less overall and some switching to spirits, which have been given a lift by innovation in categories such as gin (which Thomas knows all about). The extent to which the on-trade is struggling was highlighted by the Campaign for Real Ale figures from August 2018, which showed that 18 pubs in Britain close every week.

Moreover, young people (18-24 years) have become the adult age bracket least likely to drink alcohol because of health consciousness, a squeeze on their disposable income and changing social habits. In the off-trade – which for a brand such as Peroni accounts for most UK sales – there is also predictable pressure from supermarkets for price promotion. Of course, Asahi runs special offers – but, to retain its premium positioning, not to the extent that retailers would prefer. Insight has a role to play in the fight against discounting and brand-value erosion.

Added to all this, there has been the rise of the microbrewery and a craft beer revolution in recent years. Isn't this a calamity for Asahi? Quite the contrary, argues Thomas.

"The craft movement has been fantastic for beer. Craft has come along

**Asahi Europe is responsible for Peroni in the markets where it is a premium brand**

## Richer insight at half the price

**Paul Thomas came to Asahi just as one of its global brands was being repositioned. There was a need to test and optimise its new positioning, as well as a large number of related executions for TV, out of home, press, digital, events and so on. This was challenging because the five markets involved – Argentina, Romania, Canada, France and the Netherlands – were diverse.**

The proposal was to conduct standard, two-hour focus groups in each market, during which consumers would be taken through all the materials in one go. The projected total cost was £150,000.

Thomas had two concerns about approaching the research in this way. He felt focus-group participants would become "fatigued" by working through so much material in 120 minutes – and he baulked at the price. There had to be a better way.

"I worked with a different agency to come up with five online communities in those local markets," says Thomas. "Over the course of a week and a half, you went back to them every day with a different piece of the puzzle. This allowed us to break it down, so we got better answers."

Improved insight came in at £75,000 – half the original estimate.




**Asahi bought Miller Brands UK in 2016 and with it the Peroni Nastro Azzurro and Meantime brands**

and re-engaged people's interest in beer so it's not just a commodity. There is far more connoisseurship and discernment now. That's great if you're where we are, but, frankly, it's a massive risk if you're a brand that doesn't have a story to tell. All our premium brands have great stories to tell."

Thomas has coined what he calls the 'four Ps' of craft to illustrate what consumers relate to: process – how the beer is made; people – who makes it; provenance – origin, specific region; and product – the recipe, often down to where the water comes from.

As for the trend of falling alcohol consumption, Thomas believes the sector must get better at innovation. "There's a wonderful opportunity to deliver products that have no alcohol but that have everything else alcohol brands offer: the ritual, the glassware, the sociability, the feeling of celebration, the taste complexity, that hint of bitterness you get in alcohol that you don't find in sweet soft drinks. From a new product development (NPD) point of view, the alcohol industry has to get on it."

**"Craft has re-engaged people's interest in beer so it's not just a commodity. There is far more connoisseurship and discernment now"**

Innovation, however, is only one of several areas in which global insight is involved. "We are multifaceted as an insight team – we don't just do the data; we don't just do the innovation. We do everything: from high-level strategic ideation right down to in-store executions; from developing a platform idea for advertising to testing and optimising that final copy; and from understanding the customer reality to more old-fashioned tracking sales performance."

Asahi embraces the principle of zero-based budgeting, so every piece of research has to be justified. Thomas applauds this as a way of ensuring as much as possible is completed in-house and money is spent only on what's truly necessary. Otherwise, he believes there is always the danger that the client-side insight function becomes little more than a project-management team.

Nevertheless, Asahi works with a broad gamut of agencies, using Kantar Millward Brown for tracking, Nielsen or IRI market by market for EPOS-type data, and Kantar Worldpanel where appropriate. There is more fluidity when it comes to ad hoc assignments, but the plan is to create a roster of agencies.

This brings us back to Thomas's opinions on what clients really want from agencies.

Several months ago, in response to requests from agency partners for help in educating junior staff, Thomas posted an illuminating bullet-point list of tips on LinkedIn. It began: "Every client is different – some want detail, some want topline, some want daily updates, some want to be left alone! Take the trouble to find out."

His post drew a big response from the sector. At the time of writing, it had sparked 386 likes and 77 comments.

"One of the most obvious things for me – that agencies don't always get – is that there is not a generic carbon copy of a client. Everyone has their preferred style of working. Agencies don't try to find out, which I don't understand."

As finding things out is what Thomas is all about, it's small wonder such an oversight would not go down at all well.

# Treat yourself

**Premier Foods drew on an exceedingly simple human insight when it revisited its positioning of Mr Kipling: that little moments in life, such as eating cake, are to be celebrated. By** Katie McQuater

From Battenberg to French Fancies, Mr Kipling is as familiar to British consumers as a cup of tea on a drizzly afternoon – not to mention being the owner of one of the best-known straplines in the country. Despite the brand's ubiquity – 55% of the UK have had Mr Kipling in their house within the past year – 2017 was a disappointing year for sales, with an internal review finding its advertising and pack design were underperforming. In short, Mr Kipling needed a new lease of life.

"There's been a feeling that we haven't really been moving with the times. We're a well-loved brand, but quite nostalgic," says Catherine Haigh, insights controller for sweet treats at Premier Foods. "We really wanted to reignite the love for the brand and we felt strongly that emotive positioning was the way to do that."

Premier Foods knew from the work it had done with Bisto that emotion was the approach it wanted to take, but it had to feel current. At a time when 'purpose-driven' advertising has become somewhat clichéd, it had to be based on reality – not just people's reality, but the reality of the product.

"Our positioning had to feel like a natural fit for Mr Kipling, not something that's lofty or huge. Taking it away from this nostalgic place, but making it meaningful and relevant today – getting that balance right was so important to us," says Haigh.

The company worked with insight, strategy and innovation consultancy The Leading Edge on consumer research, to understand the place of


Mr Kipling and the category of ambient packaged cake generally, while remaining pragmatic about what role the brand should play. "Yes, we want to drive purpose, but I think we need to be realistic about our role in people's lives," says Haigh.

Sophie Cavanagh, brand and innovation consultant at The Leading Edge, agrees. "You often get these really lofty brand positionings about transforming people's lives – but a lot of brands can't, and they shouldn't, because that's not what they're there to deliver."

So the challenge for the researchers was to find a positioning that would feel universal enough for a brand as mainstream as Mr Kipling, but that still meant something, without being too philosophical – "not something that's watered down to mean something to everyone and no one," says Cavanagh.

Initial focus groups – with Mr Kipling fans, and frequent and infrequent buyers of packaged cake – focused on big, exploratory questions, such as asking participants their life motto. The research found that ambient cake isn't associated with indulgence, and consumers don't feel guilty about eating it. Rather, it's an everyday treat.

After a workshop with Haigh and her team, The Leading Edge conducted additional focus groups to co-create and test the positioning, settling on the concept of celebrating the little moments that mean the most in people's daily lives.

The research identified the things that matter to people, and what Mr Kipling could genuinely deliver on as a brand, according to Cavanagh – as opposed to "something that's really highfalutin but not credible to ambient packaged cake, or relevant to people's day to day lives."

## From spell book to magician

Validating the insights gathered in the research came from perhaps an unlikely source – Instagram. When Cavanagh did a rudimentary search for the hashtag #mrkipling, she found people were using it unprompted to share their treat moments on the platform. "The fact that people placed value on little things such as sharing a Mr Kipling cake with a colleague was really validating for us," says Cavanagh.

"They're not transforming people's lives or game changers – they're just nice little moments."

**"It's so important, as a profession, to make sure we remember to blow our own trumpets"**

This also helped Haigh when it came to getting buy-in for the positioning from the leadership team. "We were able to show our senior team that people were posting these moments they are having with our brand. That was our intent; we just wanted to capture what's already out there."

Grounding the concept in reality was important, not just for the brand positioning, but for tracking return on investment and maintaining a close relationship between insight and strategy – something Haigh feels strongly about.

"Once you have those insights, your job is to hang on to them for dear life," she says. Any time campaign results are presented internally, she adds a slide to remind the team of the process behind the work.

"Sometimes, ads are communicated internally and externally through awards ceremonies, as if they came from nowhere. We're in quite a tricky time in insight at the moment – we're always having to explain why we need to spend that money. It's so important for us, as a profession, to make sure we remember to blow our own trumpets."

Haigh adds: "People say: 'you're the spell book, not the magician', but sometimes I think we need to step up and be a bit more of the magician. It's about making sure you're promoting insight as a function for everybody for the future.

"I have been at a lot of conferences recently where people are talking about keeping back 10% of their budgets for that internal sell – you would never have heard that 10 years ago."

That internal communication includes stakeholder interviews and 'rewind' projects before new research is started, to learn from past work.

One year on from the Mr Kipling research, Haigh held a workshop with the team to discuss how the positioning could be used beyond just the ad and rolled out more clearly via social media, innovation and internally. Beyond a purpose-based positioning, the brand is also trying to establish how it could incorporate its positioning internally in its values and interview process.

Haigh's next big focus is on innovation, by identifying opportunities for new and developed product pipelines for both Mr Kipling and Cadbury. "I'd love to disrupt the category, but it's not just down to me," she laughs.

To support this, Premier Foods is undertaking qualitative research with consumers to understand their lives and the occasions where sweet treats are playing a role. "We will be identifying the opportunities that we want to go after, whether that's health and wellbeing trends and understanding the implications of that for cake, or looking at the needs behind premiumisation – is it some kind of personal reward or togetherness?

"We are looking at ways of coming up with stuff that's genuinely different, rather than doing the same thing and expecting to get a different result."

## Little Thief

**McCann, the creative agency behind the 'Little Thief' ad, was involved in The Leading Edge's focus groups from the beginning, says Cavanagh. "McCann saw and heard, verbatim, what consumers were saying, and where our recommendation and positioning came from – it could see the trail."**

That closeness is reflected in the spot, which aired in March and shows a young boy sneaking around a family party to get his hands on a Mr Kipling Angel slice. But, lo and behold, he isn't taking the treat for himself, but as a gift for his surly teenage sister who is studying at home.

Premier Foods worked with Hall & Partners to test and develop the comms idea and scripts, giving Premier Foods guidelines and rules around its creative script development for future work. "The research not only informed our current execution, but will live on and continue to inform all of our creative development going forward," explains Haigh. She adds that the guidelines were taken on board by McCann and are now referred to internally as the brand's 'Recipe for Success'.

The company also worked with System 1 on pre-testing for the ad, using the agency's database, while tests of the brand's new pack design were conducted with PRS In Vivo.

Sales of Mr Kipling were up by 9.8% six months after the ad aired on 18 March 2018, according to IRI data.

# How **business** can **harness** AI

**Unilever's** Stan Sthanunathan **has co-authored a new book exploring how marketers can embrace artificial intelligence. He talks to Jane Bainbridge about using these tools to reach customers more effectively**

To most people, AI stands for artificial intelligence. But for Unilever's executive vice-president, consumer and markets insight (CMI) Stan Sthanunathan, the better descriptor – and the one used internally at the FMCG giant – is augmented intelligence. "That means using artificial intelligence to enhance human intelligence," he explains.

This subject is currently front of mind for Sthanunathan as his latest book – *AI for Marketing and Product Innovation*, written with Dr A K Pradeep and Andrew Appels – is published. He sees AI as an essential part of any marketer's toolkit. "The amount of data flowing through is increasing exponentially and it's impossible for anyone to mine it all – so using AI is inevitable, or you're at risk of getting left behind," he says.

Like all businesses, Unilever has had to make important decisions about how to incorporate AI into its frameworks – the first being how many methods to adopt.

## Machine learning

"We concluded there's no one solution for all the problems," says Sthanunathan. "The space is rapidly evolving, so we will look at a whole range of tech companies, pilot them and experiment with them. We have scores of techniques – AI approaches – we're using internally. There are some we've tried and censored; that doesn't mean we've narrowed down the list of partners we're working with – it's actually increased over time."

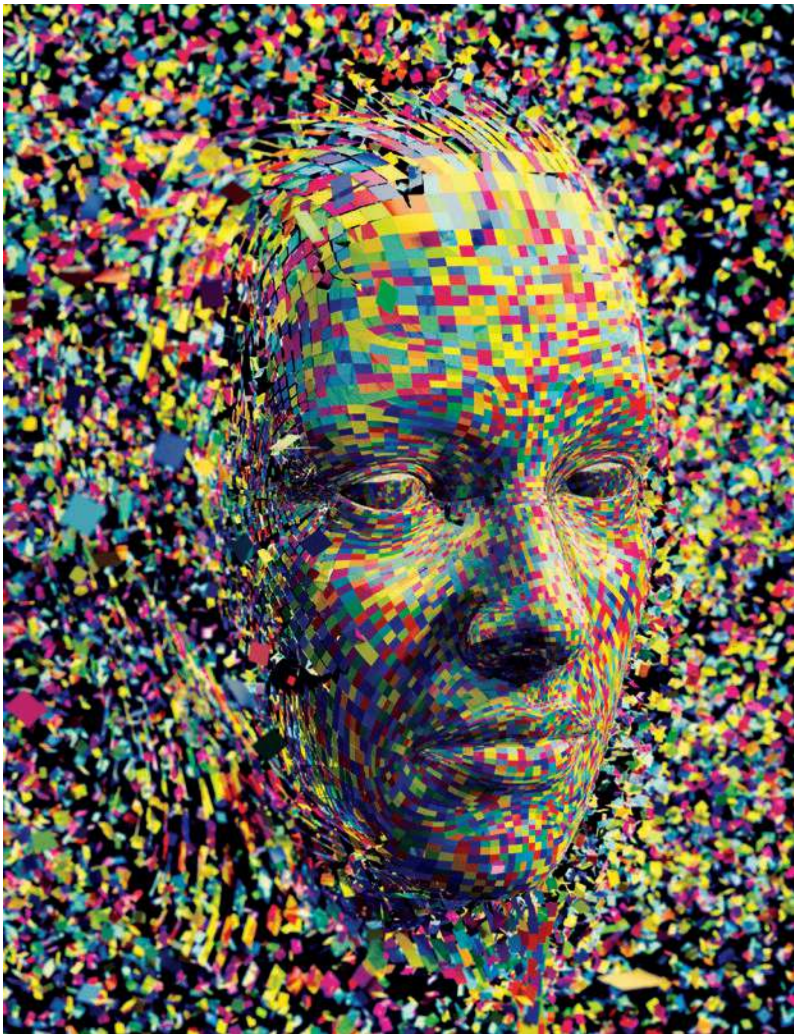
Like many organisations, Unilever is using AI and machine learning (ML) to mine structured quantitative data. But it has also been used to look at subliminal cultural influences – from the TV programmes that are watched, to magazines and blogs that are read.

"We applied machine learning to understand what big themes are emerging and to see if it can predict what's coming in the near future."

Initially, this process produced so many trends, Sthanunathan says, that it was "almost humanly impossible to make sense" of it. So, Unilever added two other dimensions – brand architecture and target markets.

"We've done enough qualitative research to know what those people think. So we bring brand architecture and mind drivers of consumers and put them through a blender – what comes out is a bunch of trends that are relevant for that brand and target market," he explains.

It is these trends that the company's brand marketers can use as they see fit. "We're not saying this is prescriptive and thou shalt do this. We distil all the things into possible areas and marketers can look at – and respond to – them. We have



given them the guard rails," Sthanunathan adds.

A criticism often levelled at marketing today is that it's obsessed with short-term gains, based on easily measurable attributes, to the detriment of long-term brand building, which may be much more difficult to quantify. Doesn't AI exacerbate this problem?

"Everyone has to manage the next quarter and that's a big challenge for businesses. What do you do to create a long-term sustainable idea? The previous example is all about long term," Sthanunathan says. "I believe it must be a blend between winning in the short term and winning in the long term. Winning in the short term requires quick response to the market conditions to protect your brand."

Citing one recent example of how AI helped Unilever address an issue quickly, he refers to a negative post about Lipton green tea with lemon, shared by a consumer on social media. The post said that if you pour the teabag contents on a black background you can see worms squiggling. "People saw the video and were outraged – it spread like wildfire," Sthanunathan says.

Unilever's algorithms spotted it early on and its R&D people quickly identified that the 'worms' were dehydrated lemon strands, which – because they are so light – appear to move, even in the slightest breeze. Unilever quickly made a video explaining all.

"From start to finish, that issue was resolved in about four days. If you don't have the capability of identifying issues at an early stage, you're in trouble. It's make or break for a brand."

## Good enough

In this brave new world of AI and ML, marketers must get to grips with new possibilities quickly. Does Sthanunathan think marketers are daunted or excited by the prospect of what this tech can do?

"A bit of both. Marketers must work in the old world and the new world – and that's not easy. To that extent, they feel overwhelmed and marketing would be damned if people started believing that it was 100% science. It must be a blend of art and science. I see AI as releasing the time, so [marketers] can do what they're capable of. Those that get it, really love the way it enables them."

One of the biggest challenges for those working in marketing is managing multiple data sources and bringing together unstructured and structured data. Sthanunathan says there are two schools of thought: one says everything must be harmonised so it can be put into a single dataset and analysed; the other prefers to blend different datasets to create an integrated analysis. He tends more towards the latter.

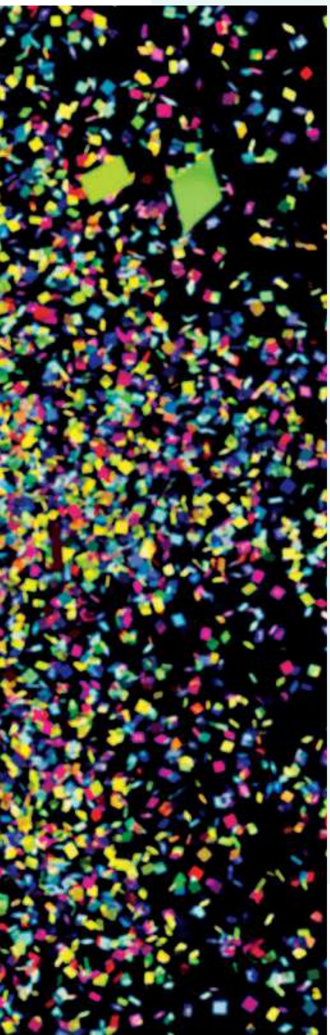
"People have spent an enormous amount of time trying to create harmonised databases over the past 20 to 30 years, spending billions of dollars, and it is never perfect. So now people are saying 80% is good enough, speed is more important to me. More people are realising that perfection is the enemy of greatness," Sthanunathan says, adding that people should get used to "perpetual beta".

He believes it's time for marketers to stop carrying on the myth that AI will kill creativity. "If you allow it to kill creativity, it will. That's where the whole notion of augmented intelligence is critical – it's a mindset."

***AI for Marketing and Product Innovation*, by Dr A K Pradeep, Andrew Appels and Stan Sthanunathan, published by Wiley**

## 5 reasons why marketers should use ML in their strategies

- **Real-time capability – consumers see ads and offers that change by the second, based on what they are searching for**
- **Reduction of marketing waste – by using behavioural data, marketing is more targeted**
- **Predictive analytics – ML can analyse big data, notice patterns and predict future occurrences**
- **Structured content – sentiment analysis that aims to determine the attitude of a speaker or writer, then recommends to marketers what to say, how to say it and the best time to say it, as well as how the audience is likely to react**
- **Cost reduction – overall, the money spent on marketing automation software is meant to be less than the money that would otherwise have been spent on sifting through collected data.**



# Customer surround sound

**Insight not only needs to help businesses understand their consumers, but also their stakeholders, as KPMG Nunwood's** David Conway **explains**

For market research professionals, the facts make difficult reading. According to a *Harvard Business Review* article, only 11% of decisions affecting customers are backed by customer insight. So if the remaining 89% of decisions that affect the customer are made intuitively, it would explain why consumers are finding little real improvement in their overall experiences with UK companies.

KPMG Nunwood's latest report, *Ignite growth: connecting insight to action*, shows that – despite many businesses focusing intensely on customer experience – there has been little improvement in customers' perceptions of their experiences.

The report includes the UK's overall Customer Experience Excellence (CEE) score, a weighted average metric, mapped against six pillars – personalisation, time and effort, resolution, integrity, expectations and empathy – that drive brand advocacy and loyalty. This rose from 7.08 (out of 10) in 2017 to 7.13 in the latest analysis.

Closer inspection of companies leading the way in this year's rankings reveals one common characteristic improving successful customer experience – most are customer-insight driven. A majority of the decisions made by these higher-ranking businesses are grounded in deep customer insight – and, when intuition is required, it's usually drawn from a real closeness to the customer.

In our most recent US report, *Engineering a human touch into a digital future*, a leading American financial services brand aptly described its insight process as 'customer surround sound'. It demonstrated that an understanding of the customer's psyche is accompanied by the constant drum beat of their changing needs and requirements.

Research into people's lives isn't enough, though; the brand's staff must also live like a customer and experience what is really happening. As the saying goes, 'to really understand me you have to walk a mile in my shoes'.

**"A valid, actionable insight achieves nothing unless it reaches the relevant decision-makers and they act on it"**

**Patrick Barwise, emeritus professor of management and marketing, London Business School**

The leading US brand demonstrated that it is an environment of constant customer immersion for its staff, where customer understanding affects every dimension of the business. Leading organisations follow the golden rules for demonstrating and delivering empathy, including: investing time to listen to their customer; providing the right emotional response; and demonstrating that they care.

Turning our attention back to the latest UK analysis, financial services also ranked highly, with first direct, Metro Bank and John Lewis Finance securing three of the top five spots. Those performing well in the rankings demonstrated a keen focus on understanding their customer.

Indeed, as a chief executive of one of the leading financial services firms said: "It would be impossible to deliver a consistently high standard of customer service without insight. The world is moving at a pace never seen before. The things we think of today as certainties are only certain to be wrong – as innovations and attitudes change. We use insight to stay ahead of the curve. It runs through the business, from the people speaking to customers directly, to the teams analysing the data. It's not just the senior leaders – it's through everything and everyone."

For insight to make a difference, not only does it have to lock on to where decisions are made, but it must then shape how those decisions are taken.

Decision-mapping and stakeholder-profiling are new tools in the insight professional's toolbox. Those working in insight today must understand their stakeholders, and the parameters within which they operate, with the same zeal as they seek to understand the customer. It is no longer enough to provide dashboards and reports. These have a purpose, but delivering superior customer understanding across the organisation requires immersion, co-creation and involvement.

The start point, however, is decision-targeting, and stakeholder personas are a useful mechanism.

These should include the following:

- **Problems:** the issues on their current agenda
- **Priorities:** the most pressing problems
- **Participation:** the decisions they take in combination with others
- **Personality:** how they best assimilate data (numbers, pictures, immersion)
- **Decision span:** the decisions they take on their own.

Making insight timely and relevant is half the battle; the other half is creating a demand for insight from the top.

There are different ways of making sure the customer's voice is heard by leaders in the business. The CEO of another leading financial services firm in this year's UK rankings hosts a customer 'heartbeat' meeting every Monday, in which senior executives from around the firm consider the customer feedback from the previous week. They discuss what is and isn't working, and consider what they need to focus on in the coming week from a customer perspective.

This sort of approach creates a consistent and pervasive view that influences customer decision-making elsewhere in the organisation. The role of the insight team is to ensure that each function has the right information and insight to bring to such a meeting, allowing them to understand their stakeholders in detail.

For these organisations, insight is driven top-down, not insight-team-up. In effect, the insight team helps with an enterprise-wide, three-part process. It starts with the acquisition and integration of data, combining social, operational and primary data into frameworks, to distil insights rapidly. Prescriptive analytics and business understanding then focus activities to incite action, and, finally, the right culture and environment ensures insights guide activity and growth.

It is managing this process – spanning integration, action and growth – that has led to thousands of consumers ranking certain brands more highly in this year's top 100 for customer experience. Strong performers commonly identify managing the wider insight process as a business-critical component. It is at the heart of these organisations, the lifeblood enabling them to truly drive organisational growth.

**David Conway is director at KPMG Nunwood**

# Is CEO churn a reflection of our times?

In an unprecedented period of change last year, 18 FTSE 100 CEOs departed – from Mark Wilson at Aviva to Sir Martin Sorrell's high-profile exit from WPP.

Their tenures were somewhat different: Wilson joined Aviva, the UK's largest insurance company, in 2013, while Sorrell founded WPP, the world's largest agency group, in 1985. Wilson served just five years, in contrast to Sorrell's run of 32 years – which makes him the longest-serving FTSE CEO of modern times.

Interestingly, Sorrell also made the fastest comeback in recent corporate history, returning with a new shell company within about six weeks of his departure and his first digital acquisition a month later.

According to a survey published by Nasdaq-quoted executive search consultancy Heidrick & Struggles, the global CEO churn rate has been rising steadily since the start of the millennium and has nearly tripled, from 3.4% in 2001 to 9.3% in 2016.

Over the same period, the FTSE 350 churn rate increased from 9.5% in 2001 to 16.5% in 2016. Interestingly, one in five FTSE 100 CEO appointments was made within the past year – and just one in three CEOs appointed since 2012 currently occupies the role. Life at the top has never been more precarious and, globally, only 13 out of 1,000 CEOs go on to take another chief executive officer role.

**"Life at the top has never been more precarious and, globally, only 13 out of 1,000 CEOs go on to take another chief executive officer role"**

Perhaps this accelerated change at the top reflects how fast businesses need to evolve in the fourth industrial revolution, and the inherent volatility associated with the rapid change.

Alternatively, it may be a natural culmination, 10 years on from the global financial crisis and the longest bull market in history – events that ushered in a period of low economic growth and low inflation against a backdrop of high asset inflation and massive digital disruption.

From high street retailers to global consumer packaged goods (CPG) companies, businesses found themselves without pricing power, struggling to compete against discounters and online operators, with high commodity prices and rising minimum wages. Against these insurmountable headwinds, change at the top is inevitable while boards grapple with new-age problems of disintermediation and margin-shrinking transparency.

Unsurprisingly, in times of trouble and uncertainty, there is a human tendency to return to the tried and tested – to old brands and formulae that have worked in the past, and that are respected and trusted.

Recently, famous founders have been revived as new products in three different industries – Marcel at agency group Publicis, Jack's at retailer Tesco, and Marcus at investment bank Goldman Sachs. All have one purpose: to reinvent the business model and/or regain lost market share in areas adjacent to the core market.

First, Publicis unveiled its AI-powered platform Marcel, named after its founder, Marcel Bleustein-Blanchet. It is described as a 'reinvention', with Publicis – having broken the divide between data, creativity and technology – now breaking the barriers between talent and opportunity, centred on productivity, connectivity and knowledge.

Later, Tesco launched Jack's, its cut-price brand designed to take on the German discounters Aldi and Lidl. The new concept is named after the company's founder, Jack Cohen, who was nicknamed 'Slasher Jack' because of his 'pile it high, sell it cheap' approach. The new model is focused on low prices and 'quality' British produce.

Lastly, Goldman Sachs launched Marcus, its easy-access online savings account, which offers savers a highly competitive 1.5% per annum interest rate. Named after one of the founders of Goldman Sachs, Marcus Goldman, it is described as transparent, secure and easy to use.

Back to the future.

# Big data in the boardroom

**Top execs know big data is helping their businesses, but they are invariably baffled by it and stuck in an old-school mentality about decision-making.** Ben Bold **reports on a new study into the current boardroom mindset**

Big data has the power to disrupt and to enable deeply granular insight that can transform the way companies do business – from how they market to prospective and existing customers to how much revenue they generate. Gathered and exploited properly, big data equals big returns.

So it's perhaps surprising to hear that those at the top – the CEOs, financial directors and chief operating officers – are still scratching their heads over it. In this so-called digital era, where big data is being woven into the very fabric of business, that's a worrying notion.

Yet it's the key takeout from a report *Big Data, Big Decisions: The Impact of Big Data on Board Level Decision-making*, co-authored by academics from institutions including Brunel University London and Coventry University.

## Behind closed doors

While big data is widely discussed at a societal level, and in terms of its implications for business relationships, the report's authors felt a light needed to be shone on its influence on a seldom-researched group. "Much has been written about big data – what it is, how it can encapsulate new insight or be a superior alternative to existing sources of insight, and how it can change how businesses make decisions. However, little is known about how key decision-makers in firms use big data, or not," says co-author Dr Ana Isabel Canhoto, from Brunel University.

The team of researchers set out to study top-level decision-making processes made by board members at 19 organisations, spanning the FMCG, finance, consultancy, IT and air-travel sectors. In-depth interviews – ranging in length from 90 to 150 minutes – were conducted with 20 directors involved in high-level decision-making.

The result is a piece of qualitative research, of more than 40 hours of material, delving into the experiences and views of CEOs, managing directors and global heads of digital – a notoriously hard group to persuade to take part in qualitative studies. This was backed with extensive secondary data analysis from sources including annual, corporate governance and AGM reports, and minutes and media articles.

## Cognitive dissonance

Of course, business leaders are far from stupid; they recognise that big data can improve their decision-making, and the research findings support that premise. But working out how big data can help is eluding them. Many feel hampered by their lack of technical skills or daunted by the 'non-linear thinking' needed.

What became apparent from the study was that board-level execs are insufficiently equipped to deal with the influence of big data in decision-making. They are prone to cognitive bias, suffer from information overload and are stuck in old-school ways of thinking about information. This situation is exacerbated by a reliance on subordinates who tend to provide simplified, 'top level' round-ups of big

data. One of the report's key reveals was a disconnect between old and new – whether that's old-school, intuitive approaches to decision-making versus more data-informed approaches, or the difference in worldview of senior board-level leaders and that of a generation that has grown up with digital.

"We tell stories and we go from A to Z; everything we do is about having a beginning, a middle and an end," one respondent said. "It's how we've been educated, how we process information, and how we strategically think and, therefore, deliver a result."

But, the respondent added, there is an emerging generation that is non-linear in the way they operate. "If I'm talking to a 10-year-old, they're not necessarily interested in the story of Little Red Riding Hood. [But] they might be interested in the world of Little Red Riding Hood, in which they would like to immerse themselves."

**"Some board managers said it was hard to decide when to stop consulting the data being generated and make a final decision"**

## Information overload

That idea of immersion in a sea of information is, the study found, overwhelming many execs, who feel they are drowning in the sheer volume of data. There is simply too much information to process.

"I don't think you've got enough hours in a day to solve these problems, because we still have an overload of data," said one director. "Sometimes, less data is better than more data." Another was more forthright: "The people who are doing well are the ones that can cut through all the crap and make decisions based on facts."

The quantity of big data on offer is a challenge that is further exacerbated by the pace of change characterising today's business environment. The study unearthed boardrooms steeped in data, but intimidated by its speed and unable to react quickly enough.

While they are feeling pressured to rethink the way they do business, execs feel they cannot afford to pause while they adjust their approach. They are stuck in an ever-decreasing circle of having to modify their current processes while continuing to use them to carry on functioning. Some board managers said it was hard to decide when to stop consulting the data being generated and make a final decision.

## New thinking

What the report starkly demonstrates is that today's boardroom execs need to reappraise their approach to big data. "Being typically middle- to old-aged, many board members are ill-equipped to do that," Canhoto observes – but some boards are taking remedial action.

Dr Alessandro Merendino, another of the study's authors, stresses that its aim is to "make directors and the boardroom cognisant of the benefits of using big data in strategic decisions".

In the meantime, Canhoto points out, there are two ways in which boards are dealing with data challenges and, fundamentally, both involve bringing in new blood and new mindsets. "One way is to break down silos and create new senior roles that bridge functions and the gap between technical knowledge and decision-making," she says. "The other is to outsource these responsibilities to strategy consultants, digital experts or other external stakeholders with the necessary expertise."

***Big Data, Big Decisions: The Impact of Big Data on Board Level Decision-making* by Ana Isabel Canhoto, from Brunel Business School at Brunel University London, and Alessandro Merendino, Sally Dibb, Maureen Meadows, Lee Quinn and Lyndon Simkin, at the Centre for Business in Society at Coventry University; *Journal of Business Research*, 2018.**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# The future is data interpretation

Over the past few years, I have had the privilege to mentor undergraduates at my former university in Lancaster, and look forward to doing so again this year. The mentoring scheme offers students an opportunity to speak to – and learn from – analytics professionals across a range of industries. For the mentors, it's a great way to get a better understanding of what's important to young people who are looking to enter the analytic arena of market research.

I'm often asked how I see people-based jobs within analytics and data provision developing in the future. At its heart, this question challenges us to consider the role that technology is playing – and will play – on analytic-based activities currently undertaken by humans.

At a recent meeting, I faced these technological advances first hand. A partner organisation demonstrated a platform designed to analyse customer-purchase data. What I saw was a pre-programmed computer demonstrating multiple data retrievals and repeating the task at speed. Compared with other programmes I see every day, this demonstration hit home because it was performing the job I had done in the early part of my career – a role that was once seen as complex and that had helped identify me as a specialist.

The programme clearly needed some help to get up and running, but it was a stark reminder of the positive progress in our analytic space and how roles evolve.

The requirements of data analysts are advancing, and the base capabilities will continue to rise as new approaches to analytics develop. Look at our industry job descriptions; data scientists are all the rage, but – just like in the world of science – new techniques will come along to challenge existing practices and roles will evolve.

This example of seeing my analytic work superseded by technology tees up a broader challenge for analytics across our industry. Automation of analytical processes leading to faster data is a good thing, but – in isolation – it only goes so far. Data is only as valuable as the insights you can gain from it. If you can't interpret the data, does the speed at which you get it really matter as much?

Being able to find, and then tell, a compelling story from the data output is critical for it to be useful. Most of us want our data in a format that makes finding what is important simple to access. The pace of complex analytic delivery is accelerating, but keeping pace with the right visualisation is another challenge when it comes to people's roles and technology use.

**"Being able to find, and then tell, a compelling story from the data output is critical for it to be useful"**

Existing charting tools that have underpinned presentations for the past 20 years are challenged as an acceptable format, but the one thing they gave was a consistency and common language in visualisation. Without access to visualisation tools that translate data into a usable format, the benefit of improved analytics can be lost.

Across our industry, turning data into an easily understood output is increasingly automated – which is to be welcomed. New visualisation tools are emerging, but we need to know what to use where, and when, to ensure we deliver impactful insight.

Getting to recommendations from the data that can drive a business – particularly in the boardroom – will mean that people who understand how to interpret data, and how to extract important insights, will still have a valuable role to play.

The industry's task is to secure the value of analytical research in the future. My advice to this year's undergraduates will be to grab the opportunity to enter a market research industry in which the sophistication of analytics is fast-moving and evolving. The roles will be exciting, and having the mindset to continually evolve, to deliver the changes, will be essential to ensure the analytic role remains a central pillar in advancing market research.

# A video **interaction**

**There are options beyond the go-to presentation slides when delivering complex research data to clients, as Netfluential found when working with Samsung. By** Jane Bainbridge

PowerPoint has always been a divisive presentation tool. Loathed by many, it's clung on as the default software for many organisations looking to present information internally or externally, despite its limitations.

Technology has moved on, however, and while working with multinational conglomerate Samsung, consumer insights consultancy Netfluential upgraded its presentation style to include interactive videos. With this technology, it could share its insight in a more engaging manner and allow a range of stakeholders to access content most relevant to themselves.

Jeroen Verheggen, CEO and founder of Netfluential, admits he's not a fan of PowerPoint. "I don't like it very much – never have and never will. It is a poor man's creative tool, and I can never really get across the mix of quantitative and qualitative data as I imagine it," he explains.

While Verheggen says there are numerous data visualisation and dashboard tools, as well as ways of creating a magazine – "call it a playbook and you get extra cool points" – none are quite right. And when they do engage as intended, it's often only for one section of a business. Just as clients often ask for everything explained in five slides, however, video invariably has to be kept short.

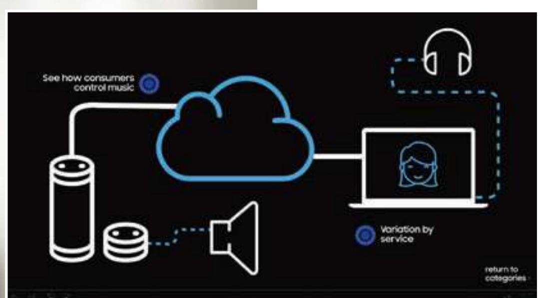
"Video is a great tool, but the problem you have is that not every story can be told in 1:30 min – the official videographer limit for research output, apparently," says Verheggen. This time constraint prompted him to explore interactive videos, as they allow layers of content to be built up.

"You can use techniques such as branching [sending the viewer off in alternative directions], hotspots [allowing the viewer to click on areas of interest for a new layer of information], gaming with engaging tools such as a quiz, and chapters – allowing a story to unfold with video or audio, animation or statistical data," he explains. "All of this allows you to fuse rich qualitative data with survey or customer data."

Verheggen worked with WireWax, a self-serve studio platform, to create the interactive video. Basic licences start from £49 per month, but – to make full use of the software and create a bespoke look and feel – a project will be more than £4,000. An experienced video editor is also essential.

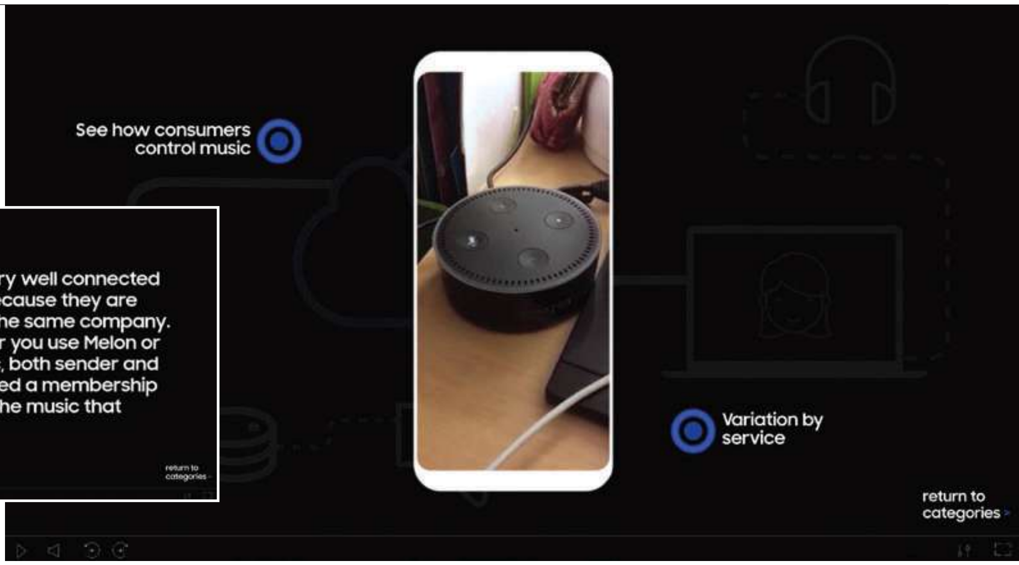
Netfluential's research for Samsung was based on the company's desire to move from device-focused planning to consumer experience planning and design – spanning different appliances and devices.

Lawrence Gould, senior consumer market insights (CMI) manager, Samsung, says: "With so much new


**The multi-device experience (MDE) tool allows content to be built and refined to create an interactive library of intelligence**

**Samsung wanted to understand how people use its devices and services**





information, we needed to produce engaging – yet clear and concise – deliverables, making the new knowledge travel far."

The research resulted in a huge amount of rich qualitative data, plus a vast survey-based dataset: 200,000 variables were collected.

"Communicating this amount of data succinctly and clearly, without losing valuable richness and detail in this new area for the business, was highly challenging," Gould adds. "The research results needed to form a source of insight and inspiration for not just product planners and engineers, but also designers, marketers and sales teams. So there was a clear need to give pinpoint access to the relevant findings for a department or function around a specific category or consumer issue."

Samsung wanted to understand how people in several markets use services across its devices and appliances, identifying the pain points for those using categories such as music, video, news, health, photos and gaming to establish a hierarchy for innovation.

"We used several techniques, such as mobile self-ethnography, task-based user diaries, group discussions and surveys. With a load of data – including rich video content and survey data – collected and analysed, we created a hierarchy based on a 'who needs what' principle, to communicate the information for different stakeholder groups," says Verheggen.

Netfluential designed an information architecture to build out the data in branches, by category, and used layers to give topline information, followed by depth. It built in hotspot areas, where the viewer could click on areas of interest to see more detail or underlying data.

"Next, we built a knowledge quiz to challenge other viewers [mainly marketers] to express what they already knew about consumers in a specific category. Subsequent video layers contained more detail around use-case situations, emotions and segment differences – all more useful to marketers. We used more than 40 hotspots per category to help viewers delve deeper into the data as needed," Verheggen explains.

**"We can keep refining and building content to create this interactive library of intelligence"**

Gould says the interactive video acts as a hub of new knowledge that is accessible to teams across new product development. "Because multiple device experience (MDE) is relatively new to Samsung, it is a great tool to rapidly explain what we're doing and get people on board. I like how we can keep refining and building content to create this interactive library of intelligence."

Verheggen sees interactive video not only as a good tool to debrief clients and disseminate information, but also to collect data. "Survey panel and customer survey data is far from perfect. Video, in this engaging interactive form, can really help with testing ideas and concepts, or exploring a customer journey," he says.

"If you do that at scale, and use augmented and virtual reality to help create scenarios and situations – plus natural language processing, AI and biometric technology for analysis – it becomes much better-quality data."

And, Verheggen predicts, it'll be mainstream within the next three to five years.

# The tech changing customer experience

**From predictive AI to the use of voice in everyday devices, Professor** Steven van Belleghem **looks at five technologies that will change the way people interact with brands in the long term**

Last year, there were some huge announcements from the tech industry. Several came from the world's most famous brands, whereas others were from innovative start-ups looking to disrupt established industries. But how do we know which are simply marketing hype and which will truly have an impact on the lives of customers? Here are five that will shape the future of customer experience:

## 1 Falling cost of prediction

The influence of artificial intelligence (AI) in our day-to-day lives has been growing for years, but AI-based prediction became a mainstream tool for brands in 2018. It can make a big difference to the customer experience. First, we will see the arrival of predictive commerce, as companies forecast your future purchases faster than you can think – this is already creating a big part of Amazon's business. Second, as AI-based prediction becomes more commonplace, human interpretation will become more scarce – and so will increase in value.

## 2 Checkout-free shopping

The announcement of AmazonGo created a huge buzz in 2016, and people seemed genuinely excited about the idea of shopping in-store without queuing at a checkout. Revenue per square metre of the concept stores has been so strong that Amazon has now announced it plans to open 3,000 across the US over the next three years. Not to be outdone, China's largest retailer, JD.com, has announced it will open 1,000 per day over a similar period.

Meanwhile, start-ups such as British company MishiPay are trying to make this customer experience possible even for small, independent retailers. In the space of just two years, cashierless shopping has gone from crazy concept to something that could soon be the norm, offering a fast, convenient experience that people will soon expect.

## 3 The AI battle between the US and China

When Google's Deepmind defeated the reigning human champion at Go in 2016, it was a pivotal moment in the evolution of artificial intelligence. Not only did it demonstrate how powerful AI had become, but, in China, seeing a foreign company win at one of their national games triggered a huge wave of investment into AI development.

As a result, 'China AI Town' has become a 2km$^2$ campus filled with companies and researchers working on every possible application for AI that you can imagine. Some of the developments emerging are in the fields of image and language recognition, which will have big implications for customer data and experience.

## 4 Cars become data centres

We've all heard the stories about tech companies using smartphones to monitor customer behaviour, but now it seems car manufacturers are getting in on the act.

General Motors has invested heavily in smart cars and autonomous driving, and recently admitted to 'listening in' to how passengers use in-car entertainment systems. Its goal is to understand more about what customers want, because – as we move towards driverless vehicles – a car will become a powerful entertainment and advertising platform.

Another discussion is around which AI assistants will be used in your car. In 2018, Toyota started integrating Amazon's Alexa in its vehicles, Nissan, Renault and Volvo partnered with Google, while Mercedes created its own version. Cars have become computers on wheels, and this will drive new business models in the coming years.

## 5 Jeff Bezos' microwave oven

When Amazon launched a microwave that integrated Alexa this year, the critics were harsh. However, the company is clearly launching a microwave to demonstrate how powerful it can be to incorporate Alexa into other household devices. It recognises that voice is soon going to be the primary interface for customers – and it wants to make sure its software runs these devices.

**Professor Steven van Belleghem's latest book is *Customers the Day After Tomorrow***

# Behind the social media conversation

Historically, research teams have been encouraged to work faster and more efficiently, because marketing moved faster than market research did. In the technology industries, this pressure can be even more pronounced because of the speed at which companies can change their core product, never mind their marketing.

Take food companies, for example. Fundamentally altering their product can require changes throughout the supply chain – from packaging design right through to how factories or plants are set up. For a tech firm, such change involves experimentation and then an update to the code. This is still a significant undertaking, but undoubtedly faster than making physical changes to a factory. As a result, almost all the researchers I've met from other technology companies cite agility and speed as the main priorities for their teams. Broadly, I've found research teams in Silicon Valley exploring three areas to help them with this:

1. Develop data science and automation skills so researchers can access and use behavioural data directly, without having to work through an intermediary team
2. Invest in quick turnaround methodologies, such as community research or mobile panels
3. Explore new sources of insights, particularly social media.

Much has been written about the first two points, so I wanted to focus on the third. Social media research has grown significantly in popularity over the past few years. According to the latest GreenBook GRIT report, 55% of clients and 41% of research suppliers have now adopted some sort of automation for their social media research programmes. Yet I still believe we're only scratching the surface of what social media data can offer research teams.

Since 2016, I've been a judge for the Social Media Research Award, part of the annual Market Research Society Awards. As accolades season has come, it seemed like a good time to reflect on the innovations we have seen through these award submissions, and offer a view on how to get the best from your social media data.

It would be bizarre to attend a focus group and not spend a moment considering the people involved, their backgrounds or beliefs, and how that might shape what they say. The same applies to social media data. It's easy to look at what people are saying, but the most insightful analysis comes from teams who understand that audience deeply. Consider spending time evaluating the audience around a conversation, their interests and influencers, and how these change over the period of your analysis.

**"The most creative social media research is by teams that don't simply focus on brand keywords"**

The most creative and actionable social media research is done by teams that consistently look more broadly at consumers' lives and that don't simply focus on brand keywords. For example, if you are researching conversations related to banking, limiting yourself to branded keywords will probably only pull in complaints and customer service queries. Instead, look much more widely, for the moments in people's lives when they might need a bank. This is how people naturally use social media – to talk about their holidays, their children or their new homes. Understanding these moments offers a much richer source of insight than simply monitoring conversation around a specific brand.

We've seen some fantastically innovative work done that uses social media as a predictor of consumer behaviour or brand health – everything from insurance risks to movie-ticket sales. Consider what business metrics might be predicted by the conversation of a particular group of consumers, run some experimental models, and see how this might add to your existing brand or business-tracking programmes.

Social media data is a major component of any fast, agile research team, but frame it as a source for insight and not solely for measurement. Go deeper into defining audiences, cast the analysis net wide enough to capture insights into consumers' lives, and then think how your team could use the results to predict business metrics, rather than report them in isolation.

# What do you call it?

**Inanimate objects with nicknames are more likely to be looked on favourably by consumers than those that remain nameless, according to new research. By** Katie McQuater

My first set of wheels was a bright red Fiat Punto named Holly Golightly, in homage to my favourite film at the age of 18. As humans, the desire to anthropomorphise inanimate objects is a long-enduring trait it seems – and it's not just our cars; we assign nicknames to everything, from boats to laptops to bikes.

In recent years, brands toying with personalisation have started to get in on the name game, with companies encouraging consumers to come up with a name for their products. Toyota's 2015 'Mas Que Un Auto' campaign, for instance, gave Toyota owners free custom nameplates for their cars, while some banks allow customers to set up nicknames for their accounts.

But does naming something increase our affinity for it? Could giving a product a name even make us more likely to buy it? And do these effects extend to naming seemingly mundane, everyday objects?

The phenomenon is the subject of a research paper, published in the *Journal of Consumer Psychology*, which looks at how the act of naming a product can improve consumer evaluations and even increase purchase intentions – in other words, people place more value on objects they have named.

Previous research had found that naming something can lead to feelings of psychological ownership – the view that you own something even if you are not the legal owner.

Perceived ownership can also boost consumer evaluations of an object. Research in 2009 from Joann Peck and Suzanne Shu, for instance, found that merely touching something results in an increase in perceived ownership – and subsequently positively influences people's opinions of the object.

Therefore, the researchers hypothesised that psychological ownership would play a mediating role – in other words, if you give something a name, your feelings of ownership increase, and in turn you place a higher value on said object.

Jennifer Stoner, assistant professor of marketing at the University of North Dakota, first became interested in the naming issue when she gave her new mixer a nickname. "I started to look in academic literature to better understand anything I could about naming of products and was surprised to find there wasn't any research on it," she says. "Around the same time, I started to see that companies were doing things to encourage consumers to name their products."

The research also sought to find out whether names given by the consumer themselves would have more of an impact than pre-assigned names, and whether assigned names that describe a product (such as 'Muggy' for a mug) would perform better than names that bear no relation (for example, a mug named 'Bob').

For the first study, 48 participants were each given a stress ball and told to squeeze it at least once a day, with some of the participants asked to give the ball a name and describe why they chose it.

In a follow-up session four weeks later, participants were asked how much money it would take for them to sell the ball – testing their 'willingness to accept'. The study found that those who had given their stress balls a name valued them more than the control participants who hadn't; in fact, they would charge over a dollar more to part with it.

**"People who named the stapler themselves were more likely to want to buy it"**

In a second experiment, 200 participants were shown a picture of a blue stapler, with some people asked to give it a name. In two other assigned-name groups, participants were informed the stapler's name was either 'Blue' (descriptive) or 'Steve' (non-descriptive), while another group of participants (the control) did not see any name.

People who named the stapler themselves were more likely to want to buy it and reported higher levels of psychological ownership, according to the study.

Because naming an object is something that usually happens spontaneously, the researchers faced the challenge of trying to capture that phenomenon within a controlled study. "We were originally worried that if the participants were told to name a product as opposed to doing it spontaneously that we wouldn't find any effects," explains Stoner. "It's really exciting and promising that we did."

The researchers also conducted a third study where participants were given either a white mug or a blue stapler and asked to rate the object based on a name they had chosen themselves, a descriptive name ('Muggy' or 'Blue'), and a non-descriptive name ('Bob' for the mug and 'Steve' for the stapler). They were asked how likely they would be to buy the product and assessed on their attitudes towards the object (how much they liked the object on a scale of one to seven).

Objects that people had named themselves were looked on more favourably and elicited higher purchase intentions than those with both descriptive and non-descriptive names, while descriptive names performed better on both measures than those with non-descriptive names.

The researchers chose stress balls, staplers and mugs because of their everyday mundane nature – they were unlikely to elicit strong polarising reactions from the participants or connect with some people more than others (in the way that, for example, a musical instrument might for some people who play).

"For me, the most interesting finding is that effect persists over time and has an impact on how people value their products," says Stoner. Going back to the first study, she says: "The participants who had named the stress ball would charge $1.40 more for it (which is quite a lot for a basic stress ball)."

Stoner wants to do more research on the reasons behind spontaneous naming of products, such as how people arrive at the names they choose, and whether any other factors – brand, product type or distinctiveness – impact the effectiveness of naming a product. "I think it would be interesting to see how the relationship with the product changes over time if it has a name (do you take better care of it, keep it longer, feel more attached to it, and so on)," she adds.

In her view, more brands should be encouraging consumers to name their products. "Brands are trying to make their products more customisable by having them in different colours or with different features; however, encouraging customers to give their product a name can be a quick and cost-effective means to implement customisation that has many of the benefits of more expensive methods."

**'The Name Game: How Naming Products Increases Psychological Ownership and Subsequent Consumer Evaluations' by Jennifer Stoner, Barbara Loken and Ashley Stadler Blank, Volume 28, Issue 1, *Journal of Consumer Psychology.***

# How 'sludge' joined our vocabulary

Ten years on from the conceptualisation of 'nudge' by Richard Thaler and Cass Sunstein, with the publication of their bestselling book of that title, the word is established in our vocabulary. As an evolutionary development, 'sludge' is becoming recognised as its antonym. Thaler and Sunstein asked that people 'nudge for good', but it's clear that companies and organisations don't always do this. They can – and are – taking advantage of innate consumer traits and fallibilities, such as inertia and inattention. They do this knowing they can profit from consumer weaknesses and biases, but in ways that hurt, rather than promote, consumer welfare.

> **"A UK Citizens Advice survey found that people paid £160 on unwanted subscriptions between June and August 2017"**

Sludge has been coined to label, shame and, increasingly, regulate against this sort of behaviour. It includes hidden add-ons, long and confusing fine print, complex subscriptions, or bureaucratic red tape and paperwork.

Thaler recently defined two types of sludge: one discourages behaviour that is in a person's best interest, such as claiming a tax rebate; the other encourages self-defeating behaviour, such as investing in a deal that's too good to be true.

Think how many services to which you subscribe – probably Netflix, Amazon Prime, Spotify or Audible, to name just a few. Analysis, this year, by ING estimates that the average European household spends €130 a month on subscriptions – around 5% of total household spending. In business, software as a service has also become increasingly common.

## Sludge as a 'behaviour blocker'

Here, sludge acts as a block to doing what's in our best interest. It might achieve this by taking advantage of consumer inertia, opaque terms and conditions, red tape and complexity, or poor user experience. For example, insurers charging a higher premium-renewal price to customers. If they don't question the rise and phone to ask for a discount, the higher premium is applied. Rather than being rewarded for loyalty, consumers are penalised.

Subscriptions can often be classified as 'behaviour blocker' sludge, by renewing automatically and being difficult and time consuming to cancel. Behavioural science repeatedly finds that, if an action is too difficult to carry out – if there are too many hurdles to cross or it's unclear how to go about it – people just won't bother, or they will postpone it until they are less busy (a time that often never arrives). This is more challenging now because of the sheer number of subscriptions we have.

A good proportion of our subscriptions are wasted. A UK Citizens Advice survey found that people paid £160 on unwanted subscriptions between June and August 2017. In 2017, US telemarketing firm Suntasia faced a federal lawsuit after charging hundreds of thousands of customers an average of $239 each for worthless subscriptions.

A team of researchers ran an experiment to see which method of cancelling subscriptions worked best. Its paper, in *The Economic Journal*, found when subscriptions were terminated by default 99.8% of customers went ahead and cancelled their subscription. When they had to act to cancel, however, just 36.4% did so. Even more worryingly, less educated consumers living in poorer areas were less likely to cancel.

## Sludge as 'behaviour enticer'

Here, sludge persuades us to do something that isn't in our best interest, by drawing on common psychological traits. For example, insurance add-ons in the form of pre-ticked boxes appear to be a recommendation to purchase, and can take advantage of our desire for 'peace of mind'. 'Drip pricing' – where consumers are initially attracted to a temptingly low headline price and then

underestimate the cost of 'add-ons' – is another example. In 2012, concerns about this led the UK regulator, the Competition and Markets Authority (CMA), to curtail some airline payment surcharges. Hotel booking sites often use techniques – such as pressure selling, misleading rankings in search results and hidden charges – to entice us to 'book now'. Again, the CMA has launched an investigation into these practices.

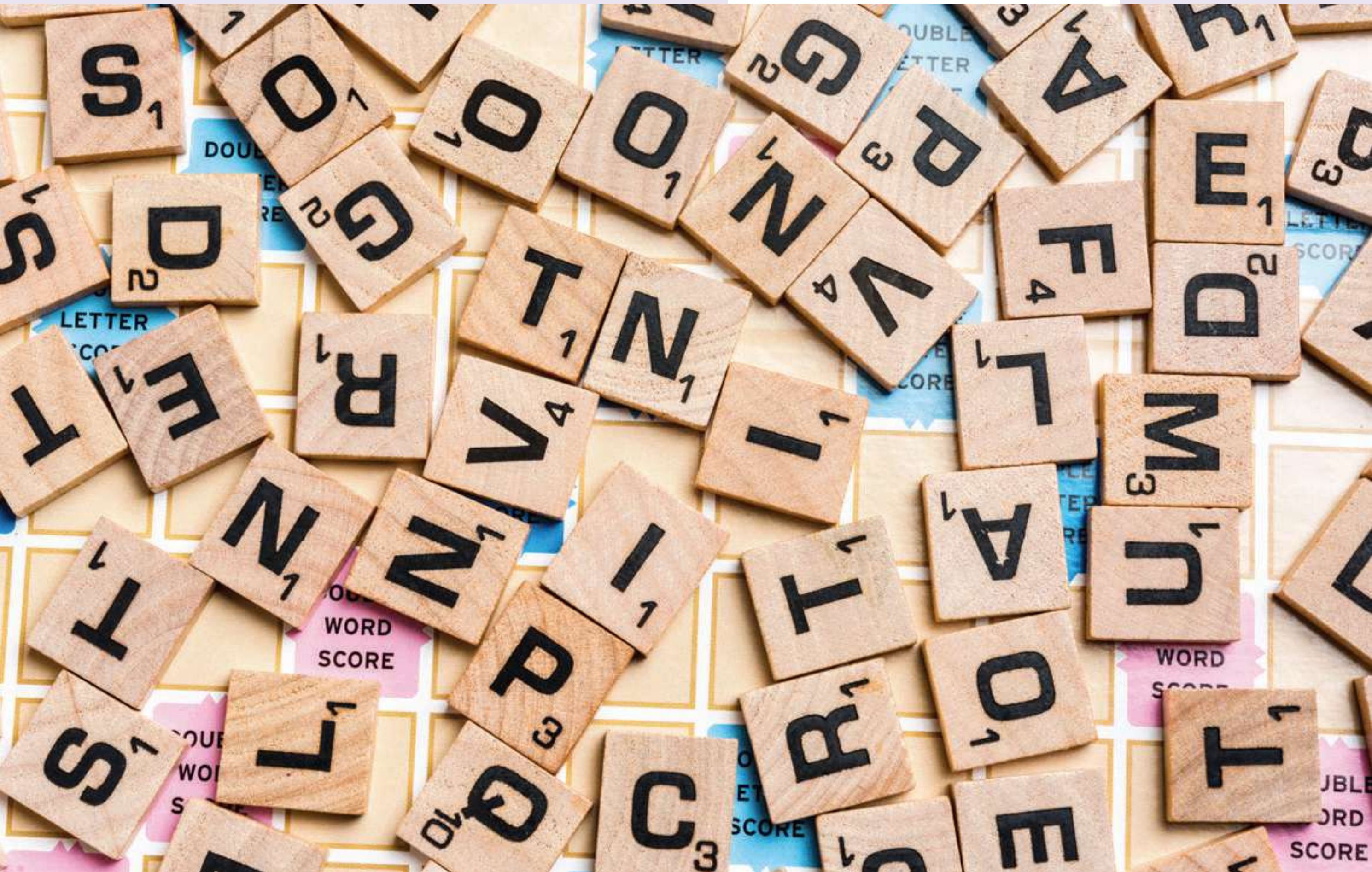
Subscriptions tend to feature in this category because they often employ 'bait and switch' models of payment. A low price or free initial trial is used as a bait, with fees then rising, often in an obfuscated way, with little or no communication to warn consumers that their trial period is ending.

Experiments run by the European Commission (EC) in 2016 found that, when an attractive price is very prominent, consumers tend to be distracted from subscription fees. They also commonly suffer from over-confidence, thinking they will remember to cancel a free trial/subscription. Further research from Ioannis Ampazis, of the EC, revealed that more than 97% of the offers screened used a misleading practice, and half of the free trials and subscriptions included five problematic practices, such as poor clarity around subscriptions and trials.

Chancellor Philip Hammond announced plans to tackle this sort of subscription sludge in the March 2017 Budget. He pushed to make subscription terms clearer and included proposals to prevent "unexpected payments". He also handed regulators greater power to fine companies in breach of these standards.

## Implications

- The concept of sludge has been conceived – what's significant is that it is being used in a positive way to label and shame tactics and techniques that, arguably, take advantage of the consumer, leaving them worse off
- Encouragingly, there is already regulator restriction on sludge techniques in some sectors, such as airlines and hotel bookings
- Don't be surprised to see a crackdown on sludge techniques in other sectors, particularly the subscription economy
- Keep an eye out for the growth of personal subscription manager companies and apps to help people manage their subscriptions (similar to open-banking portals, but for subscriptions).

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# Taking a different view

**Kenny Imafidon is managing director and co-founder of research consultancy ClearView Research. Since he set up the company three years ago, his mission has been to ensure that under-represented voices are heard through market research and insight. He talks to** Jane Bainbridge

## What made you set up ClearView Research in the first place?

I've always been curious about what people think, and want to understand why people do what they do. From an early age, I've also been passionate about and interested in how we can inform leaders' decision-making, so they can make better decisions. So research was the perfect profession for me.

We set up ClearView Research (CVR) for three main reasons. The first was that, to my surprise, when I first started conducting research projects from the age of 18 (I am now 25), I realised a lot of people and businesses in the industry were not capturing the thoughts, attitudes and behaviours of those most marginalised in society. People were going for the 'easy' targets and not going the extra mile to hear the voices and opinions of those generally excluded from mainstream research. People were talking about millennials, children and people from under-represented groups but not actually truly engaging and collaborating with them, in their studies. We wanted to do things differently.

The second was that I came across a lot of interesting research studies that were full of rich data and so much insight, but they were difficult and boring – in terms of their content or presentation style. Research can look beautiful, digestible and you shouldn't need a PhD to understand it. As a business, we pride ourselves on ensuring that our research is always accessible, engaging and inclusive for a wide audience.

Finally, I saw poor decision-making from leaders in politics, business and charities. These are the people we rely on and trust to make decisions on our behalf and in our best interest. Yet, they often act without correct and up-to-date information. Some act on their gut instinct or, worse, no consultation at all. I am a big believer that research can be an effective tool for sound decision-making and, most importantly, social change.

Research can change the hearts and minds of decision-makers across all fields and industries. We need to ensure that they are given trusted, well-researched and valuable insights to help them to have a clear view, so they can make the best possible decisions.

## Were you specifically looking to fill a gap in the market?

I don't believe in reinventing the wheel. If I'd seen someone else doing what we were doing, then CVR wouldn't need to exist. We wanted to provide our clients with trusted, unconventional and valuable insights, mainly on millennials, Gen Z and people from under-represented groups. We wanted to help businesses, NGOs and governments to solve complex problems.

## What do you offer that's unique?

CVR has an organic and trusted network of partners of individuals and organisations across various communities in the UK. We've built these through personal networks, direct outreach and collaborating with individuals and organisations on the specific brief. We've been fortunate to have a database of potential participants and partners that we can call on, and that I've been building since I was 18. We've also developed an insight-gathering

methodology called 'solution labs' which takes a core element of traditional focus group methodology. However, what makes it different is that we take an unconventional approach to gather insight in a co-creative and engaging way. These solution labs appeal to multi-sector clients who are interested in obtaining insights through inclusive and collaborative means.

We don't just focus on doing research – we take very seriously our approach to effective engagement with all our research participants. We know that being able to engage those least likely to be involved in research studies is key to our USP as a business.

## How have your background and experiences helped you with the work you're doing today?

I really believe my background and experiences have been an asset to my work as a researcher. Growing up in the area I did (Peckham – way before it was this 'cool' place to go), I have been exposed to the challenges and difficulties of what life can be like for those who are most excluded from society.

Being a young person, being black, being part of a minority group, coming from a deprived area and so on, means that I have a unique understanding of what life is like for those who we tend to work with for our own studies and reports. This understanding has helped shape our participant engagement approach and the way we do our work too.

**"I have a unique understanding of what life is like for those with whom we tend to work..."**

## What methods of research do you think work best in reaching younger audiences?

Nothing beats face-to-face engagement when wanting to reach people in my generation. If you want to hear from those who are least likely to engage in research it is best to meet them in person. We mainly run solution labs with younger audiences. The people we engage through our solution labs become valuable social referrers for our online surveys.

## What are the most interesting projects you've worked on in the past year?

We were commissioned by GambleAware last year to conduct a study into the attitudes of black, Asian and minority ethnic people towards gambling. This research involves us carrying out solution labs and in-depth interviews with people aged 11-24 across the UK.

We were also commissioned by Unicef UK to gather in-depth insights from children and young people living in the UK aged between 10 and 20 about their habits and behaviour online and offline; their behaviour around sharing content; their views on children's rights; and their understanding of Unicef UK.

The insights will assist the youth strategy team to develop more productive ways for children and young people to contribute to Unicef UK's organisational priorities. The team wanted to obtain these insights in an engaging manner that would best capture the views of children and young people. We conducted solution labs with children and young people across Swansea, London and Birmingham and we got more than 800 responses to our online survey. We've presented the insights, and the recommendations are currently being implemented.

We worked in collaboration with another charity called Peer Power on a brief for NHS England. This research was to provide a youth voice to the review process of the healthcare standards of young people in secure settings. It involved us conducting solution labs and interviews with young people in different secure settings – such as youth offender institutes, secure training centres and secure children's homes.

We shared our insights in a report and a presentation to the expert reference group responsible for reviewing the standards.

## You do a lot with younger audiences – what do you think are the biggest factors affecting millennials today?

The top three, in no particular order, are employment, housing, and mental health and wellbeing.

### So many organisations are trying to improve their diversity and inclusion; what is the most important change businesses can make to be more inclusive?

Reverse mentoring programmes are very effective. Reverse mentoring relationships provide a safe place to get comfortable talking about race and inclusion in the workplace, which leads to fresh perspectives and accountability on specific actions.

These relationships can be more challenging, but also powerful, as they are often contrary to the usual hierarchy. And senior sponsorship of reverse mentoring programmes has become more popular across sectors to embrace diversity. It's contributed to building more inclusive senior leaders and empowered young future leaders to affect change.

There are several businesses and organisations already doing this, and a great example can be seen at KPMG in the UK. There, graduate Olu Odubajo, a customer and digital analyst, is mentoring managing partner Philip Davidson.

He and other junior colleagues from black heritage are mentoring senior leaders in the firm. KPMG isn't perfect, but it's making strides in the right direction. More businesses and organisations need to make more of an effort to recruit staff from under-represented groups and to stop making excuses.

Diverse talent exists. If you say that you cannot find people from under-represented groups to take up positions, particularly in leadership or governance roles, you are either not looking hard enough or looking in the wrong places.

### What are your ambitions for ClearView? Do you want to expand into regions/disciplines/markets that you aren't in currently?

We would love to expand our business into multiple African markets. Over the past year, I have been to six countries in Africa and seen the enormous opportunity for our work to thrive there. As someone from the African diaspora, I would love to replicate the impact we are having in the UK in the motherland too.

We would also want to do more work in helping organisations – big and small – to recruit millennials for governance roles, particularly for charities, where we know that trustees aged 18-24 represent just 0.5% of all charity trusteeships.

We would love to play a role in making an impact .

## 5 tips on... building a great research career

- **Be brave – the least familiar career path to take is often the hardest because it is out of your comfort zone**
- **Do research – and I don't mean page one of Google when you start exploring your options. There are so many types of research careers, from methodologies to sectors, so make sure you understand where it can take you. You might be interested in shopper behaviour but you might also be interested in how market research combats terrorism – there is a job for both**
- **Connect and network – it's never been easier to find people. Follow them on LinkedIn / Twitter / Instagram and you will expand your own echo chamber and learn about the opportunities**
- **Prepare for a non-linear career path: don't get hung up on job titles – focus on learning and environments**
- **Keep learning – whether you are just starting, or you are 20 years in, there are ample opportunities to continue to build skills.**

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

# Full and equally accessible research

Promoting diversity and inclusion as integral to organisational culture is slowly becoming part of the accepted approach and values of ethically responsible researchers and research companies. With this increasing attention and commitment, it is important to ensure that accessibility is explicitly placed within this broader agenda.

Accessibility in research should be viewed as the design of research products, devices, platforms, services and environments to meet the needs of people with disabilities. It ties in with data protection obligations that emphasise transparency and tailoring of privacy information for different audiences.

It is underpinned by the Equality Act of 2010, which entrenches accessibility to specified services and places a duty on organisations to make reasonable adjustments for disabled users' needs.

Although a binding legal obligation under the Equality Act will seldom be applicable to commercial market researchers, there will always be the ethical duty to ensure research projects reflect the wide diversity of our world and respect the rights and wellbeing of all individuals. Everyone in research must make efforts to ensure research participants with disabilities can take part and access the same projects, in similar time and with similar effort, as those participants who are not disabled. So what should inform an accessibility strategy in research?

Researchers need to reflect on what accessible means for their approach to different types of research projects.

## Proportionality

The Equality Act is a useful guide for considering where changes may be made, that the requirement is proportionate, and that organisations consider the:

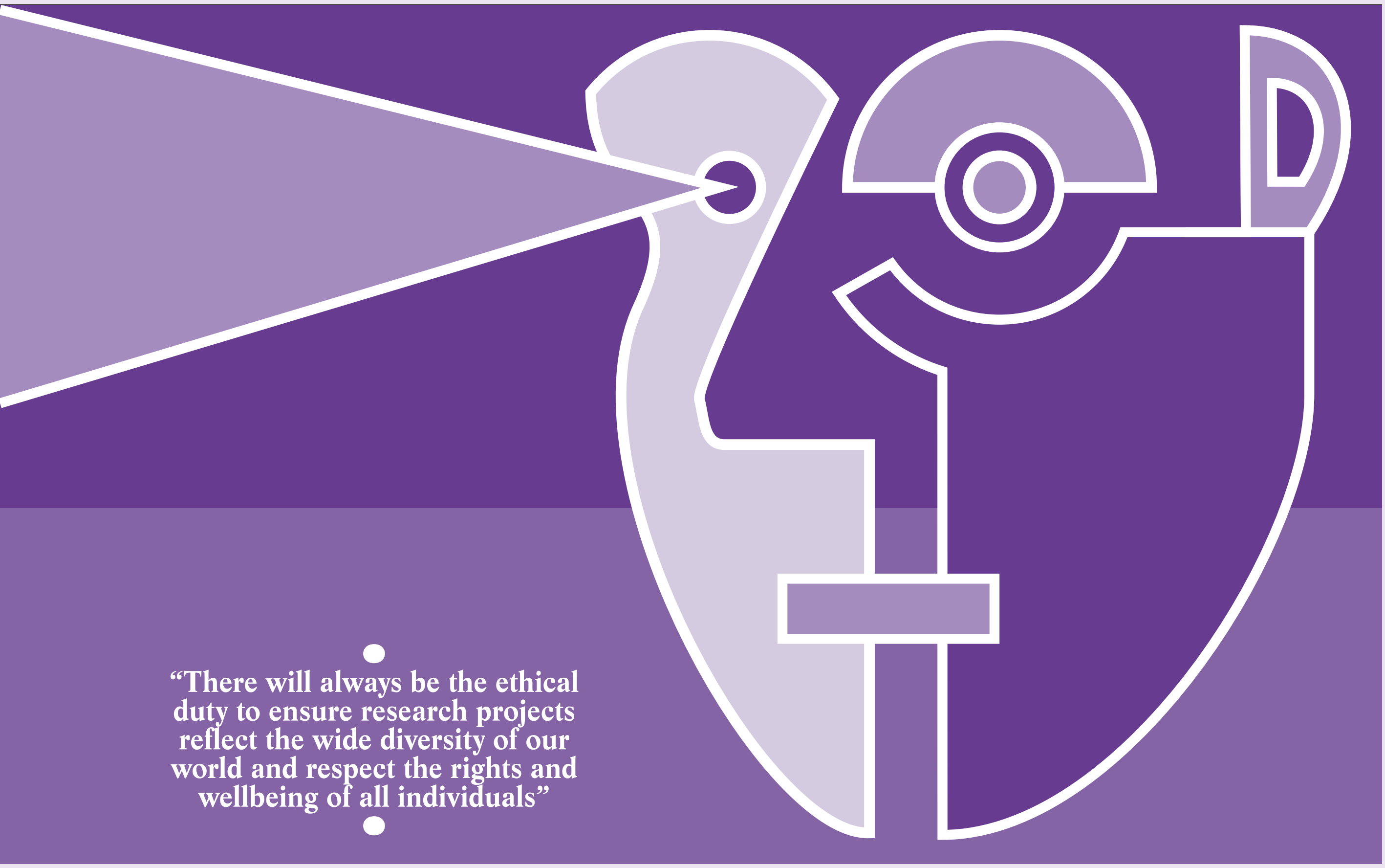
- Nature of the disability
- Practicability of changes
- Use of the changes and whether they would overcome the disadvantages disabled people experience
- Size of the organisation
- Amount of money and resources available
- Cost of making changes.

Proportionality of tailoring means that, while researchers may need to make greater adaptations where disabled people are the focus of the research project, adaptations must always be considered and incorporated (as appropriate) as part of all general research design.

## Research method

Lack of accessibility adaptations can impact on participation throughout the research cycle – from recruitment through to obtaining consent for taking part, interviewing and reporting of findings. Researchers must ensure that different adjustments are embedded for different interactions, as appropriate.
For example:

- Face to face – how does this work for participants with reduced mobility? Think about physical adjustments and features such as steps and stairs in research centres. Are all areas accessible and is extra staff assistance available? How about blind and partially sighted participants? Can visual aids and showcards be avoided?
- Telephone – are measures in place for participants with hearing difficulties? Think about using telephone amplifiers to make incoming speech louder, or use of textphones or videophones.



> "There will always be the ethical duty to ensure research projects reflect the wide diversity of our world and respect the rights and wellbeing of all individuals"

- Postal – can participants with reduced or low vision participate? Is it short enough to allow those with reduced dexterity to complete the questionnaire?
- Online – can participants with reduced or low vision participate? Think about ensuring layouts are readable. Is HTML being used appropriately on a website?

## Disability inclusion

Several factors need to be tackled to ensure inclusion, such as the research environment, including: inaccessible buildings or transport services; other people's attitudes because of stereotyping, discrimination and prejudice; and the approach of the research organisations in ensuring that information is accessible, and policies and procedures are flexible enough to accommodate changes.

There is potential for a wide range of accessibility modifications for people with:

- Hearing impairments – use subtitles or transcripts for videos; check whether portable hearing loops are available; consider a sign-language interpreter
- Low vision – use good contrasts and readable font sizes in documents; employ a linear, logical layout; and ensure that text flows and is visible when subject to high magnification
- Speech impediments – use unaided communication methods, such as body language, sign language, and verbal and gestural strategies
- Physical or motor disabilities – use large, clickable actions for online research; design projects for keyboard or speech-only use; ensure that the physical environment is suitable
- Reading impairments – use images and diagrams to support text; keep content in documents short and clear.

Importantly, people with disabilities can advise on the effectiveness of different methods for doing research with people with impairments. Consultation will help to ensure that the approach to the research is as inclusive as possible.

## Accessibility is key to better research

Researchers need to play their part in empowering individuals by reducing any barriers to research participation. Understanding the perspective, needs and priorities of people with different impairments will help you to deliver better quality research and meet your research objectives.

MRS will publish guidance in early 2019 to support members in embedding accessibility in research projects. As a starting point, develop an ethical approach that commits to diverse and inclusive research approaches that are accessible to all – and ensure that you are:

- Prepared – but proportionate in making adjustments
- Flexible – but open about what can and cannot be done
- Empathetic and empowering, to maximise individuals' participation in the research.

# Augmented insight for future growth

There is a danger that after the frenetic excitement of the Christmas period, January can seem a bit bleak. But I'm a strong believer that in testing times we have the opportunity to distinguish ourselves.

After all, it's not all about Brexit; there are still certainties that we need to grapple with, and trends that show no sign of abating.

How we understand customer choice is changing. Voice control is transforming how people buy things and their relationship to brands. Machine learning is embracing every form of data – binary, visual, structured and wildly disassembled – and predictions are being formed, sometimes without us even asking questions. Meanwhile, bias is the silent assassin to free choice and equality, having been (unwittingly?) programmed into algorithms.

These are just a few of the ethical and practical challenges the research sector is going to meet head on this year. This magazine and the MRS annual conference – Impact 2019 – reflects the dual meaning of the word 'impact'. Impact is not just about business outcomes, but a point of collision of many different forces, approaches, beliefs and desires.

It's our responsibility to make sure that the impact we seek is positive, growth-driving and a force for good – not a spiral into chaos and destruction.

To make this happen needs something more, something new. This is why I have chosen the word 'augmented' to represent a step-change increase, an additional layering of intelligence that can magnify the effectiveness of insight. To deliver augmented insight, we must understand where to strike the balance between human intervention and automation.

'Augmented' is on the one hand practical and achievable, but properly applied it has unlimited potential. I believe the research sector already has many of the skills and tools to make this happen, and this conference will bring together some of the best examples out there, so that we can deliver at pace the growth that businesses need.

So there you have it – 'Impact 2019: Augmented insight for future growth'. There's nothing bleak about that if we all rise to the challenge. Will you join me?

## Sector and MRS news

### Standards review

Issues relating to standards and quality are impacting the research sector more than ever before. Our first MRS Policy and Standards Review outlines what MRS is doing on behalf of our company partners and members to protect their ability to operate, and to promote the professionalism of this sector. Find out more at mrs.org.uk/about/standards-review

### Policy

MRS is leading a project within Efamro, jointly with Esomar, developing a GDPR Research Code for the research and insight sector. This code will be pivotal in helping our sector to maximise the opportunities of GDPR, more effectively apply the legislation and help with cross-border transfers outside the EU. We will keep you updated on progress.

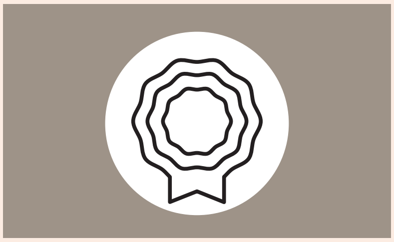
### Intelligence Capital™

MRS, in association with Kantar, will be publishing a report in February that introduces intelligence capital as a core requirement, alongside financial and human capital, for any successful organisation. The skills of insight professionals to combine data sources and turn them into an actionable story have never been more important. See mrs.org.uk/resources/intelligence-capital

# Making the most of your membership

**MRS membership shows your commitment to research excellence, connects you to a network of 5,000 experts and gives you access to a huge range of specialist benefits**

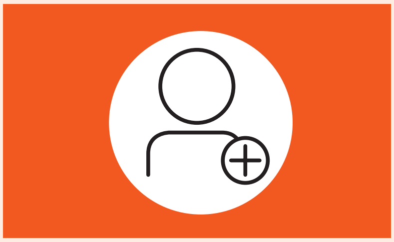
## Sector recognition



### As a member you enjoy professional recognition

MRS membership proves that you work to the highest professional standards. You prove your expertise with designation letters – MMRS or CMRS – demonstrating that you abide by the MRS Code of Conduct and commit to high-quality insight. Many rosters and procurement contracts require organisations to have MRS members on their teams, so employers value membership as a result. In fact, MRS members are often the change-makers and leaders within our ever-evolving sector.

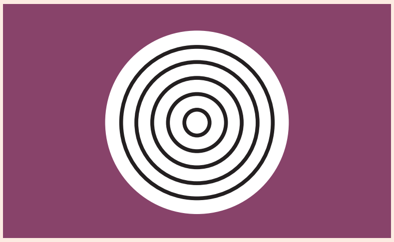
## Speaker evenings



### Attend a range of engaging free speaker evenings

Run regularly throughout the year, speaker evenings feature case studies, experts and thinkers from across the sector. Our 2019 programme covers a diverse range of topics, including thriving online communities, how to stop speaking 'Quantish' and a sector debate on work-life balance. Speaker evenings offer an informal environment to talk to other professionals who share your interests and passions – over a glass of wine and nibbles. And they come free as part of your membership package.

## Professional development



### Benefit from a comprehensive CPD programme

Continuing professional development, or CPD, is a formal way of taking control of your career. It encourages you to think about your professional goals and identify any gaps in your knowledge or skills. You can use the specialist online system to track your achievements, and record your learning or attendance at professional events. Crucially, you can also use your CPD as a route to attain the higher grade of membership – Certified Member. To set up a CPD online account email **cpd@mrs.org.uk**

## Access your benefits

- Sign into your MyMRS member account at mrs.org.uk to access all of your benefits
- Don't have an account? It's easy to create one at mrs.org.uk (top right-hand tab). From here you can access your benefits as well as read premium content on research-live.com
- The benefits available in your MyMRS account include: GDPR resources, pre-recorded webinars, the Knowledge Centre, SAGE Research Methods, guidance on the Code of Conduct, case studies and *IJMR* (for CMRS and Fellows).

**www.mrs.org.uk/membership/benefits**

# Diary dates

## Member event

**Operations Network meeting**

Regular meeting for the unsung heroes of research to network and discuss operational issues and topics.

**22 January**

## MRS Roadshows

**Across the UK**

Meet the MRS senior team and find out about the latest MRS initiatives and developments impacting the wider sector.

**24 January - London**
**31 January - Birmingham**
**5 February - Cardiff**
**20 February - Leeds**
**5 Margh - Edinburgh**

## MRS Annual Conference

**Impact 2019 – Augmented Insight for Future Growth**

Impact 2019 will explore and reveal how augmented insight is essential for building businesses. Join more than 500 professionals to hear from the widest range of voices in the insight community.

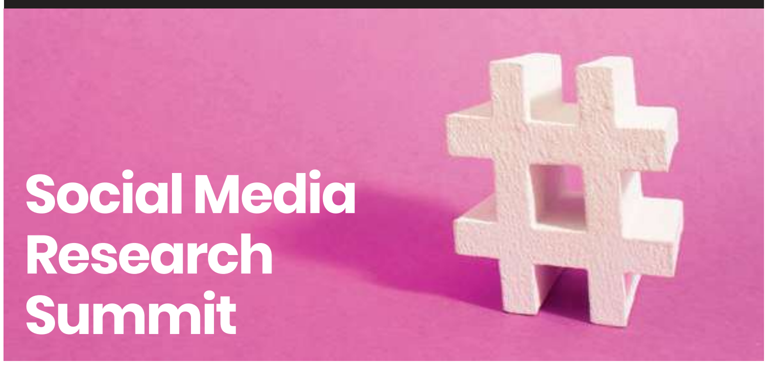
**12-13 March**

**Professional webinars and speaker evenings are free for members.**
For information on all MRS events go to
**www.mrs.org.uk/events/conferences**

**24 January | London**


Discover how pioneering approaches are uncovering hard-to-reach insights into youth culture at the Kids and Youth Research Conference.

**7 February | London**




Join us at the Social Media Research Summit in an exploration of the challenges, pitfalls and opportunities of today's social media.

**28 February | London**


Identify how to generate exceptional data-driven insights from multiple data sources at the Data Analytics and Insight Conference.

# 7

**Simon Horton is founder of Negotiation Mastery and has taught hostage negotiators, some of the world's largest law firms and banks, and many other household-name organisations. A visiting lecturer at Imperial College London, he is author of *The Leader's Guide to Negotiation*, published by the *Financial Times***

**1 The western political climate has become more divided, with participants increasingly unwilling to engage in constructive debate. What's your advice for those setting the agenda?**
Sadly, I think it is the politicians who are leading this polarisation because they see personal gain in it. I would encourage them to stop viewing it as a 'my party v their party' situation, but see each issue as a problem that can be resolved in a pragmatic, collaborative way. This would require real leadership, because someone would have to go first and break the mould. If they did, I'm sure it would be rewarded by the electorate, who are tired of the status quo.

**2 How do hostage negotiators deal with fear when the stakes are so high?**
Clearly, hostage situations can be very tense, but it goes with the job and anyone who applies is likely to thrive on that energy. They are usually very courageous, too. Courage does not mean fearlessness; they operate by the maxim 'feel the fear but do it anyway'.

**3 What's your advice for keeping stress under control in a business context?**
Business negotiations can be stressful too – and sometimes you have to work by the same 'feel the fear' maxim. There are many mental techniques – such as mindfulness, breathing and neuro-linguistic programming (NLP) anchoring – that you can use to calm your nerves and maintain confidence. But perhaps the single biggest way to reduce stress is to find ways to enjoy it. If you enjoy negotiations – and you can certainly learn to do this – there won't be any stress, just fun.

**4 You talk about the importance of empathy and listening in a negotiation. Are these qualities missing from the current business landscape?**
Yes, to a certain degree. Many business people put on a corporate mask, often as a way to deal with their own fears and insecurities. They can use aggressive behaviours, too, if they find it works for them in negotiations. But those who drop the aggressive behaviour and remove the mask will reap the reward. Making the negotiation human to human increases trust, and there is a high premium that comes with that.

**5 What role do facts and evidence play in a negotiation? How can these be used to influence someone?**
Facts and evidence are a key part of any case to persuade. That said, everybody will view the facts differently – and, indeed, will have their own facts to support their case. So the more you can refer to objective benchmarks, the fairer the argument will seem. For example, in a pay-rise negotiation, tie it to the Retail Price Index, or agree on a performance metric. That said, emotions are more important in business negotiations than we imagine. If you want to get your best outcome, you also need to deal with the emotional element.

**6 What advice about human behaviour would you give those working in market research and insights?**
In observing, market researchers influence too. Contextual factors and specific wordings can affect the answers they get from their interviews. Robert Cialdini talks about this in his book *Pre-suasion*. For example, charity street fundraisers get a much higher success rate if their first question is 'do you consider yourself a helpful person?' Of course, most people do – so now their helpfulness is front of mind and they are more likely to donate. Similarly, researchers influence the answers they receive, despite efforts to avoid doing so. It is impossible to eradicate and extremely difficult to allow for, but the deeper they go into it, the more reliable their findings.

**7 What's the most difficult negotiation you've been in?**
I have found myself in various difficult positions. I have had guns – even machine guns – to my head, had to hide from tanks, and bribe my way out of the hands of genocidal killers. All part of the fun, I guess!

impact

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