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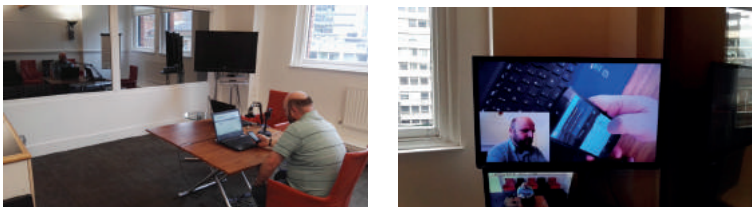web-streaming, 360 panoramic cameras and mp4 recordings

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# Watch carefully

**Jane Bainbridge**
Editor

Technology – if our office conversation is a good indicator – is a contentious topic. As we put together each issue of *Impact*, there are invariably some articles that stimulate more than their fair share of discussion. However, this issue has involved an especially high number of feature-led chats, and the debate has been more vociferous than ever.

Consumer research agency 2CV's report on the adoption of new technology in the UK (p12) inadvertently led to particularly profound examinations of privacy in the family context – all from a mother's comment about how she uses the locator and messaging app, Life360, to keep tabs on her kids, which was revealed in its qualitative research.

Interestingly – even among those who are parents - the quote immediately tipped our office into teenager mode and universal horror reverberated at the thought of such parental monitoring.

This response pinpointed the kernel of the disquiet that can surround new tech developments – are you the watched or the watcher? Perhaps Life360 felt too close for comfort to the dystopian filter-free digital age described in Dave Eggers' *The Circle*.

Not that being watched is automatically a problem – if it was, this industry would be in trouble. Data-abuse issues aside, if there is a clear benefit for those being watched – and not just trying to curtail their teenage shenanigans – then a balance between technological progress and surveillance can be found. Naked Eye's ethnographic research using drones and virtual reality in Lagos (p16) is a prime example.

A genius way of solving the problem of observing life in a chaotic, overcrowded city, drones gave the researchers, the client and the participants a view of daily life that would have been impossible without the help of this flying equipment. Yes, people were being watched – but with a clear purpose.

Then there is the tech that's at the vanguard, the purpose and power of which may not yet be understood or even imagined.

Tech innovators Cyborg Nest's North Sense (p65) fits into this category. Those who have bought this exo-sense are neither the watcher nor the watched, but rather willing tech co-habitants, just one small cyber-skip along the wearables journey.

Whether it baffles, terrifies or thrills you, the rapid progress being made in technology in our real, virtual and augmented worlds is happening. And it looks set to blur the boundaries of observation more than ever.

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**Will Amlot**



Amlot is *Impact's* regular photographer. For this issue, he captured BFH's Simon Gillespie for the profile piece on p20. **willamlot.com**

**Brian Tarran**



Former editor of *Impact* and now editor of RSS's magazine, *Significance*, Tarran wrote about the problem of fake news on p18.

MULTI AWARD- WINNING

IMPACT

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# Knowing a little

A few weeks ago, a good friend of mine was asked to write the questions for his golf club quiz. After hours of tortuous work, he submitted a list of proposed questions to the organiser.

'Which singer-songwriter hit Justin Bieber in the mouth with a sand wedge?' The organiser looked down page after page of questions like this. "These are far too difficult. We'll have whole rounds where no-one scores anything."

My friend tried again, this time with easier questions. "Too easy," he was told. "We need to challenge people a bit more than this."

He tried a compromise. He went back to the difficult questions and he sprinkled them with little clues. For instance, he now wrote 'Which *ginger-haired* singer-songwriter hit Justin Bieber in the mouth with a sand wedge?'

Now, even if you hadn't heard of the Ed Sheeran incident, you had a chance. The event went very well.

The following week I was watching *University Challenge* and it occurred to me the same process applies here. Perhaps only a minority of questions are answered correctly because someone knows the answer to the question. Most, are answered correctly because of a clever mixture of elimination, inference, educated guesswork and social cognition.

The art of writing a *University Challenge* 'starter-for-10' lies in constructing the word order of the question so an initially impossible question is leavened with various oblique clues, making it progressively more guessable.

Take a typical opener: 'Following his death in New York in 1945, his unfinished Viola Concerto was completed by his pupil Tibor Serly...' Now nobody I know actually knows the answer to this question. The odds



## "It is the best we can do given our constraints"

are that none of the contestants will know it either.

Their mental processes run something like this. "Early 20th century composer – could be lots of people. Tibor sounds a bit Hungarian. Lots of Eastern Europeans would have hoofed it to the US in the 30s. Let's go for a 20th century Hungarian."

Now Jenő Ádám, Ferenc Farkas, Jenő Takács and Zoltán Kodály might fit the bill. But if the answers to *University Challenge* questions required people to have heard of Farkas, the typical scoreline would be 15-5 and nobody would watch. "I'd put the odds at 80% Bartók, 20% Kodály." Buzz. "Bartók". "Correct."

This question was a test of knowledge. But the decisive pieces of information were knowing that: Tibor is a name overwhelmingly borne by Hungarians; Bartók was a 20th century Hungarian composer; and inferring the answer would have to be known to an educated audience. If you didn't know Tibor was a Hungarian name, you had no chance.

Most questions on *University Challenge* work like that. But so do the majority of decisions we make in life. We can't answer the primary question, so we substitute proxy questions that are easier to answer. It is what psychologist Gerd Gigerenzer calls "ecological rationality" – the best we can do given our constraints.

If I asked you which city was more populous, San Diego or Cincinnati, you'd go through a similar process. "Which one have I heard of more often? BA flies direct to San Diego, but not Cincinnati. I've heard of the San Diego Padres." You make an inference. In this case you're right.

One question researchers don't ask enough is: 'Is there one piece of missing information which could be a game-changer?' What if people knew Audis were German? What if people knew nicotine isn't carcinogenic? Perhaps the most famous press ad ever (from the 1950s 'At 60 miles an hour the loudest noise in this new Rolls-Royce comes from the electric clock') was largely conceived to convey one piece of information – and it wasn't about the clock.

So famous is the headline, people overlook that, in the accompanying photograph, the driver is female. This wasn't affirmative action: it was done, David Ogilvy explained, to disabuse Americans of the misconception that you would only buy a Rolls-Royce if you had a chauffeur; it wasn't a car you would drive yourself.

The most populous (and largest) city in Florida is (and I wouldn't have guessed it) Jacksonville. No international airport, no baseball team, hardly mentioned in the news, until recent sad events. It goes to show that, without a few good heuristics and a bit of gratuitous fame (Miami) the facts don't matter much at all. ∎

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

**UK – p12**
Despite the benefits of connected homes, there is still resistance to many of the new technologies. Research from 2CV looks at what can stimulate adoption of virtual reality, augmented reality and the Internet of Things.

# Global briefing

News, views and insights from around the world. From start-ups in Israel to the changing symbolism of car ownership in China. Edited by **Bronwen Morgan**

**UK – p18**
Since the EU referendum and Donald Trump's presidency, the rise of fake news has rocked the online and offline media world, as Brian Tarran reports.

## Israel – p14

**Israel has forged a reputation for creating entrepreneurs. Michael Kislev and Rani Chetrit point to educated immigrants and cuts in military R&D budgets as two reasons for this.**



## China – p10

**John Murphy, of Simpson Carpenter, writes about cultural shifts in car ownership in China and what this has meant for automotive manufacturers.**



## Nigeria – p16

**Naked Eye's Nick Leon explains how its ethnographic researchers used drones and virtual reality headsets to help its pharmaceutical client better understand the daily lives of Lagos residents.**

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# Cultural drivers

**John Murphy**, of Simpson Carpenter, explains how car manufacturers are reacting to the emerging culture of social inclusion in China

The dominant cultural values in China, which previously revered social climbing and the trappings of money and success, are beginning to make way for emerging values that celebrate human and natural experiences.

Car manufacturers are responding by evolving the narrative of the car from a symbol of social class and exclusivity to a human-centric life force – a vehicle of inclusivity, of reconnection with others and the world around us.

## Social climbing and exclusivity

For the past 10 years, the trend or sequence of vignettes in car ads has been like this: a shiny black car drives through a city street, an urban modern jungle; blacked out windows, a cocooning space from the outside world, a world devoid of imperfection and people.

It was a trend that spoke to the aspirations of the Chinese middle classes, who had experienced decades of hardship, but who – by the mid-2000s – had started to live out 'glory' lives, or *xiao kang sheng huo*, which means 'moderately prosperous life'. The vision of a *xiao kang* society is one in which people become comfortably middle-class, have access to consumer goods, gain a sense of affluence and a superior position in society.

For the Chinese middle classes, the car was an unusually significant symbol of social status and currency – more important, in many instances, than investing in property. Owning a nice car



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meant someone was wealthier, possibly more powerful, and so revered by society. The car was, in essence, a business card – which is why expensive, large and long-wheelbase cars, which symbolised financial power, were so popular in the Chinese market at that time.

## Inclusivity at the heart of the nation

In the past couple of years, however, the cultural meaning of the car has begun to change, as a reaction to emerging cultural values and preferences among a new Chinese consumer class.

Young Chinese consumers have started to believe that life is no longer about impressing others, but about being true to oneself and living every day to the fullest. These people belong to one of the first generations of single-child families who grew up with greater levels of security, love and attention than their forebears.

Unlike their parents' generation, they have a greater sense of inner security and are less likely to seek validation from objects such as houses or cars. As a result, some
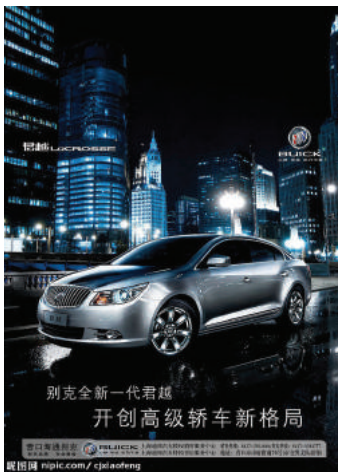
luxury brands – which previously relied heavily on messages of social exclusivity – are losing traction and being replaced with brands that convey a more practical and inclusive message; one of building intimate relationships and real connections with people and the world around us.

For example, there has been a huge trend in China recently for traditional hobbies such as tai chi and kung fu, and for holding tea ceremonies and floriculture, as well as taking care of pets and travelling around the world. According to Huxiu.com – a popular portal website in China, with more than 290 million subscribers – young people are more passionate about life than their parents' generation.

Aligned with these wider lifestyle changes, car manufacturers are tapping into themes of inclusive, everyday connections – picking up friends and loved ones, driving the kids to school, taking the family for weekend trips away – instead of using the car as a tool to show off to others.

The typical car ad today will involve a young couple, kids, pets, a café or a country road. Ford Focus has





recently opted for village scenes in adverts shot from above, with a view of the countryside, to give a sense that driving is about exploring and immersing oneself in nature – living life rather than just observing it from a distance.

Similarly, the recent Volkswagen (VW) Lavida campaign uses a café for the first frame of its TV commercial, which goes on to show a family with

pets at the end. The Buick GT uses everyday scenes from life, featuring an average man arriving at a restaurant for a date.

## Reconnecting with the outside world

Shifts in the relationship between Chinese consumers and nature have had an influence on how products, such as a car, are perceived in the minds of shoppers. Over the past couple of years, Chinese people have demonstrated a strong urge to connect with nature to alleviate the stresses of urban life.

The 'weekend trip' market has grown from 350m renminbi (RMB) in 2008 to 26bn RMB in 2017. These trips are not only about escapism, but also about relaxation, exploration, adventure and all the other possibilities that nature promises.

Automotive advertising is tapping into this trend. Brands such as Volkswagen, Honda, Kia, Citroën, and Chinese car manufacturer Soueast have started to highlight features such as the sunroof, through which kids can interact with nature, or that allows a young couple to stand up in the car and look at the world from a different perspective.

Car sales in China have risen dramatically in the past 10 years, largely thanks to strong macro-economic growth and an evolving consumer culture. This decade has been a significant germination stage for the Chinese auto market, when consumers were still immature, and the cultural climate embraced ideas of exclusivity and social differentiation.

However, in this fast-changing culture, the next generation of consumers are seeking new values that challenge outdated social and cultural narratives. If marketers want to stay relevant to this population, it is crucial they remain aware of emerging cultural values and consumer idioms, and that they keep their ear to the ground with relevant, accurate research.

**John Murphy** is cultural insight consultant at Simpson Carpenter

# Bringing the magic to the mainstream

Research by 2CV investigated how virtual and augmented reality, and the Internet of Things can break through adoption barriers. By **Richard Pickering** and **Michael Murphy**

Technology today allows us to slip into new, exciting worlds – whether that's with a virtual reality (VR) headset, augmented reality (AR) on our phones, or by using our voices to tell technology what to do. There is a sense of wonder and amazement from the British public about the technology now at our disposal.

In 2014, 2CV explored The Joy of Tech and looked at some nascent ideas at that time, to see how people felt about them, what pieces of technology were exciting them, and which they feared.

Since that research took place, much has changed – so we decided to immerse ourselves in that world again and understand what kind of technology is filling our homes, and how companies will need to respond to take these 'leading edge' technologies to the mainstream.

With a mixed methodological approach, we spoke to people from across the tech-adoption curve – from the most engaged innovators to technology laggards – and focused on three technologies: VR, AR, and the Internet of Things (IoT, for example, connected homes).

When the latest technology makes it into people's homes, there is a palpable sense of wonder, and people are surprised at how easy it is to use. The delight in interacting with technology through voice is clear from the pronouns that people use to describe their relationship with Amazon's intelligent personal assistant, Alexa; the most engaged and frequent users call Alexa 'she' and describe 'her' as an extended member of the family.

However, VR and AR deliver a similar sense of excitement. Those with VR devices love

the immersive experiences it creates, and those moments of escape from the real world. We hear countless tales of people 'forgetting' where they are and hitting themselves on furniture, or trying to rest their feet on virtual coffee tables.

The real magic, though, lies with AR. When given the chance to try AR, it is as if people can wave a magic wand and change the colour scheme in their home, try out a new tattoo design on their skin, or see how furniture would look in a room.

AR excites and can have a huge impact, from online shopping experiences – seeing how products might look before buying them – to bringing live sporting events into our living rooms.

## Connection to home

But what is it that motivates people to purchase in the first place? One factor is 'connection'. On the surface, connection relates to an enduring physical link to the home and a desire to monitor what is happening there. On a deeper level, there is a desire for tech to help with more meaningful connections between friends and families – from tracking and keeping the family safe to bringing them closer together.

"Life360 tells me exactly where my kids are – if their phone has 9% battery it gives me a warning; if they leave the house, I get a warning; I know where they are all the time… it puts my mind at ease. If they are in trouble, it sends an alert to my phone." (Mother)

This desire for tech to bring connection is

widely held. Nearly half of UK adults (46%) state that they would use a technology product to be better connected to friends and family; this is the second most popular reason for use after 'to save time/be quicker' (51%).

Far from being concerned about a home that is always listening, people like that devices such as Echo and Google Home are at their beck and call. We no longer have to do mundane tasks, such as turning on lights, setting alarms or writing a shopping list – the home can do these things for us.

Even people who have yet to experience them acknowledge the benefits of connected homes. IoT is perceived to be capable of tapping into a number of functional needs, particularly saving time and money. However, positive impressions can be spoiled when the technology fails to live up to expectations.

With the feeling of a human interface and a female voice, it is often hard for people to remember that it's still a piece of technology – definitely smart, but still not quite intelligent. Frustrations can emerge when the software doesn't recognise accents, understand complex requests with embedded sentences, or understand context.

But for groups that are less engaged, new tech doesn't necessarily excite them – rather, it can evoke fear and confusion.

To bring less tech-engaged users into the fold, brands should look to capitalise on the ease of voice activation to make their products and services as intuitive as possible.

Virtual and augmented reality are currently tapping into a slightly narrower set of needs than the IoT. The escape VR offers is very entertaining, but it's hard for many to think beyond gaming.

Currently, VR is bringing magic and excitement to the individual, but not an emotional connection with friends and family.

Users love immersing themselves in different worlds, but risk being seen as 'selfish' in group settings. This builds appetite for VR to develop into a more collective activity. The key to greater success may lie in making the entertainment a sharable experience.

If VR technology can deliver successfully on the masses' desires to use technology to learn – perhaps through travel, or seeing the world in a new light – then it is likely to grow its reach, especially if these educational experiences can be shared across generations.

So, if VR, AR and IoT technologies are to break into the mainstream, they need to tap into the core, practical functions that the average person is looking for in a new product – namely, to help them save time and money, keep them connected to their friends and family, and to give them opportunities to learn.

**Function needs for using technology**



| | To save time/ be quicker | To be better connected to friends/family | To educate yourself/learn | To save money | To socialise/ entertain |

Legend: ■ Technology in general  ■ The Internet of Things  ■ Virtual reality  ■ Augmented reality
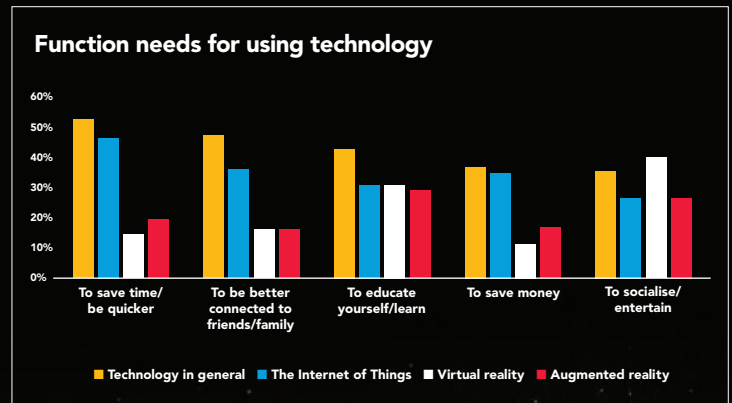
# The start-up economy

Changes to military R&D strategy and an influx of immigrants from the former Soviet Union have played a part in the rise of entrepreneurship in Israel. By **Michael Kislev** and **Rani Chetrit**

Israel is known for its innovation these days. GPS navigation software Waze, a virtual colonoscopy camera, and the Babysense monitor are just some of the many inventions developed in Israel that have spread to the rest of the world.

So what is the secret behind Israeli people being so innovative and creative? The answers are necessity and ability.

The seeds for the start-up nation were planted in the late 1980s. In 1984, roughly 55-60% of the highly trained technology labour force was employed by the military sector, while only 10% worked in research and development (R&D) for the private sector. This hampered the ability of private industry to develop its own R&D infrastructure, which is much more profitable than that of the military.

From 1987, Israel changed its military strategy, and gave up the quest for self-sufficiency in weaponry development. The country's defence budget decreased significantly in the following years, from about 20-25% of gross national product (GNP) in the early 1980s to less than 10% of GNP in the mid-1990s. Gradually, some of the technological activity for military purposes was privatised.

In a period of just a few years, many highly skilled people lost stable jobs in the Israeli military industry and had to risk founding start-ups to make a living. This led to the national budget shift from funding military R&D to offering incentives for the private

sector to invest in commercial R&D. A law introduced in 1984 allowed the Office of the Chief Scientist (OCS) at the Ministry of Industry and Commerce to fund private technology initiatives. By the end of the millennium, the OCS had sponsored more than 6,500 start-ups.

The main breakthrough in this field came from the research teams of Intel in Israel, which developed most of the company's chip processors. Israel established a reputation as a development centre for digital software, and the timing of this breakthrough was perfect for its economy.

Another boost was given to Israel at the beginning of the 1990s, as 800,000 immigrants arrived from the former Soviet Union. This brought a wave of educated workers to Israel; about 154,000 immigrants were educated to degree level, with engineering the main specialism.

More than 21,000 immigrants had a Master's degree in engineering, compared with 2,500 Israelis who held the same qualification at that time.

The OCS soon launched a programme of supporting governmental, private and third-sector initiatives through technological incubators (TIC), which offered guidance and professional support.

Each TIC employed around eight workers and received financial support from the

government for its operational activity. Projects supported by a TIC received money for its R&D expenses, including working space, networking, administrative services, professional guidance and fundraising support. These services were intended to help the developers establish their own private company, rather than to keep them as a government initiative.

Without any stable alternative, the immigrants had to take part in the new wave of start-ups.

The growth in its highly educated labour force raised the standard level needed for a professional post in Israel, and, today, a Bachelor's degree is not

enough. A high percentage of youngsters in Israel start their career only after finishing a Master's degree.

This necessity was stimulated by the Ministry of Education extending to 60 the number of academic institutes that were allowed to grant their graduates degrees. Until 1994, this privilege was mainly limited to the eight official Israeli universities. As a result, the number of students rose from 56,000 in 1991 to more than 300,000 today.

Like many other countries in the western world, Israel has focused its efforts on increasing national cyber security in the past 20 years. Once again, its decision-makers led a policy of building a system that encourages the private sector to invest in R&D and highly trained human capital.

More than 30 international companies accepted the challenge and, already, IBM, Deutsche Telecom and others have established research centres in Beer Sheva Park, making it one of the main cyber centres of the world.

This is the latest example of the government establishing policy to nurture the technology industry in Israel.

**Michael Kislev** is a political analyst and **Rani Chetrit** is an economist

# Alternative view of Lagos life

To understand people's daily lives in Lagos, Naked Eye used drones and virtual reality to give its pharmaceutical client a unique perspective on its research. By **Nick Leon**

**W**ith more than 20 million inhabitants, Lagos is the largest city in Africa. It has energy like no other place – loud, brash, sprawling and densely populated, it is traffic choked and polluted, with an intimidating crime rate and maxed-out public utilities. This is the city where our research participants lived.

Our job was to understand, for a global pharmaceutical company, how people managed flu and fever – from going to herbalists in outdoor markets, to using messaging apps on smartphones.

### View from above

The people in Lagos work long, hard hours. Many have their own business and, to beat traffic, leave home in the early hours of the morning. Throughout the day they face heat, dust and pollution – all of which take a toll on their immune systems. From their neighbourhoods on the mainland to the roads that lead to the islands, navigating the city is part of the daily grind. Participants explained that the entire ebb and flow of the city seems to revolve around the traffic.

To help us make sense of their day-to-day lives, we wanted to map their daily commute to and from work. So, an ethnographer and a film-maker from UK-based Naked Eye travelled to Lagos and teamed up with local researchers, who helped run the interviews.

The researchers captured some information on the ground, using photography and film, but were constrained by security issues and the scale and density of crowds, cars and general commotion.

To gain a different perspective, we set up observations in the air, using drones. With the help of a licensed drone pilot, we were able to film from the sky and gain incredible visuals of the spaces through which our participants moved, and where they worked, shopped and spent time. From the mainland to the island, we mapped their routes.

Once we had downloaded the visuals, we were able to compare neighbourhoods. We shared the drone footage with the participants and they were fascinated. Drone footage gave us new ways of talking to participants about the spaces that surround them at home, and to and from work. They began to tell us stories of what had happened in these different places, and pointed out things from the aerial shots that were previously hidden from sight. For example, the respiratory issues they suffered because of the dust thrown up from the dirt roads; drainage ditches that became breeding grounds for malaria in the rainy season; the lack of play space children had in their neighbourhoods; the state and repair of homes; where people congregated at weekends; the places they marked as no-go areas after dark; and the distance from their homes to pharmacies, clinics and stores. When it came to editing together the ethnographic films, the drone footage really gave the stories visual impact.

### Bringing it all back home

Many of our client team hadn't been to Lagos, so we used virtual reality (VR) to evoke a deeper sense of curiosity about the places and lives of the participants. During the ethnography, we brought VR headgear with us, so we could create films that would allow the client to step into their world and give them a preview of what they were about to see in the ethnography. This type of immersive film-making enabled clients to go on 360-degree home tours, and to visit stores to see what local pharmacies looked like. They could stand alongside street hawkers selling competing local brands and transport themselves to mock consultations taking place in real clinics.

These recent technologies are exciting research tools for ethnographers. VR, for example, allows us to move viewers away from simply 'watching', to 'feeling' and actively experiencing video content. VR, and even some of the drone footage, adds a layer of engagement with clients that moves them in a deeper way than description and reporting alone.

For clients that want to explore for themselves the world of consumers – particularly those who live in remote or distant locations – VR offers an exciting opportunity to do just that. Done correctly, it brings the world of the consumer right into the heart of the business, and creates more emotional connections and memorable learning experiences.

**Nick Leon** is founder of Naked Eye Research

# UK

**Brian Tarran** listens in as journalists and academics debate loss of trust in the media, and why digital literacy and emotionally engaging stories can help halt the spread of misinformation

# Why facts are not enough in the fight against FAKE NEWS

Y ou might have read that we live in a 'post-truth' era, when facts no longer matter and emotion reigns supreme. But Dorothy Byrne, head of news and current affairs at Channel 4, takes issue with the idea: "You can be pre- or post-breakfast, but you can't be pre- and post-truth; it's a different concept." Likewise, Byrne says, there's no such thing as 'fake news'. "If it's fake, it can't be news, because news is about something that actually happened."

However much one might dispute the labels, 'post-truth' and 'fake news' are problems that many have been grappling with since Britain's EU membership referendum, and even more so since the Donald Trump presidency.

Byrne is acutely aware of the danger of misinformation and the harm it can do to the public's perception of what's real. Speaking at a recent London conference, organised by the Westminster Media Forum, she described how Channel 4 conducted a survey of the British public, asking them to distinguish between several true stories and several fake ones. "Only 4% got all the answers right," Byrne says. "That is genuinely very worrying."

Equally disconcerting is that it will take more than facts, figures and evidence to combat the spread of fake news. A surfeit of facts will not make up for a deficit of trust.

## Loss of confidence

Surveys frequently record a decline in trust in the media and government, which leads people to doubt the information these institutions produce. This loss of confidence has left people more open to alternative sources of information, especially those that are channelled through people they *do* trust: friends, family and colleagues – the people they connect with through digital social media.

Fake news has thrived in this environment for several reasons. First, people can create content unburdened by the editing and fact-checking that news organisations employ to try to stop errors and mistruths from making it on air or into print. Second, through platforms such as Facebook and Twitter, individuals can push their content to a huge audience. Third, and most important perhaps, is that on these platforms "quality news content… is not distinguished from junk news produced to gain attention", says Martin Moore, director of the Centre for the Study of Media, Communication and Power, King's College London.

Attention is the currency on which digital media thrives. A Buzzfeed analysis found that, in the three months before the 2016 US presidential election, the top 20 fake election stories on Facebook generated a million more engagements than the top 20 'mainstream' news articles. All these extra clicks help generate revenue in the digital advertising ecosystem, further incentivising the production of fake news.

Fake news on social media is in some sense "a flight from the complexity of the world in which we live", says Steven Erlanger, London bureau chief of the *New York Times*. But fake news also satisfies another need – serving up stories that people either *want* or *feel* to be true, even if the facts say otherwise. This appeal to emotion is a central component of the post-truth phenomena, says Matthew d'Ancona, a *Guardian* columnist and author of the book *Post-Truth*.

"Post-truth is not lies," he says. "We've always had lies… Post-truth is a very specific, and very 21st-century, problem, which is where emotion trumps factual assessment and evidence."

The growing number of fact-checking organisations is an "encouraging" development, d'Ancona believes, but he warns: "Just bombarding people with facts is not enough… the answer to fake news is to wrap our response to it in an emotionalism that does not compromise factual accuracy, but acknowledges [that] the way in which people respond to information has changed." ▮

**Brian Tarran** is editor of *Significance*, the magazine of the Royal Statistical Society and the American Statistical Association

# HEARTS AND MINDS

**Simon Gillespie**, chief executive of the British Heart Foundation, is keen to move past 'finger-wagging' approaches and towards building positive engagement with stakeholders. He talks to *Jane Simms* about how the charity is working to achieve this

P eople who've been touched by heart disease, cancer or multiple sclerosis (MS) are often inspired to run a marathon to raise funds for a relevant charity; Simon Gillespie was inspired to run the charity itself. Chief executive of the British Heart Foundation (BHF) since 2013 – and, before that, head of the MS Society for seven years – he believes 'affinity with the cause' is important.

"My aunt had MS when I was growing up, and I saw the impact it had on her and my cousins as

she deteriorated," he says. "That spoke to me. I didn't set out to be the chief executive of the MS Society, but when the job came up, it was too good an opportunity to miss."

Similarly, during Gillespie's first year at university, his father died from a heart attack the day before his 58th birthday. "That gives me a very personal link into the sudden devastation that heart disease can wreak. I would have found it difficult to do this job at a charity with which I don't have a connection – and where I don't feel that I can

make such a big difference." He's careful not to 'universalise' his own experience, "but it gives me a bridge – people understand why I'm around; I've been touched by a similar condition to what they, or their children, are going through."

However, it's not so much his personal connection with the BHF that has informed Gillespie's approach since he joined, but his broad and deep knowledge of the sector. He was director of operations at the Charity Commission, head of operations at the Healthcare Commission, and – as a non-executive director and trustee – has extensive national and international experience of charity and non-profit governance.

Steeped in the sector as he is, though, Gillespie was shocked by "the size, scale, extent, breadth and impact" of the research funded by the BHF. "We are the biggest funder of cardiovascular research in the UK," he says. "We finance 55% of it; government funders such as the Medical Research Council and the National Institute for Health Research put in about 35%, and the remaining 10% is made up by the other charities – the Stroke Association and Diabetes UK. That gives us a very strong and impressive position."

However, the public was as unaware as he was of "the biggest secret of the BHF," so much of Gillespie's focus over the past four years has been on communicating the amount of world-class research that the BHF does – and, crucially, how that translates into benefits for hundreds of millions of people around the world.

## De-risking research

The charity is making research even more central to what it does. "We have committed to spend at least £100m a year on it over the next five years; within that, there are some key shifts of emphasis – notably the introduction of a 'translational' research funding stream," Gillespie says.

"There's no point having a piece of research that generates 10 scientific papers that no-one acts on. If there are good ideas out there that haven't been picked up – but that look as though they would benefit patients – we will try to push that process forward. We are introducing a grant funding scheme designed to 'de-risk' certain things and make them more attractive for pharmaceutical, biotech or venture-capital companies to take on. We don't have the resources to take a drug through to development and into clinical use, but we can catalyse others to do it."

Another thing Gillespie has sought to address is the misconception among large swathes of the

public that heart disease, unlike cancer, is almost 'a lifestyle choice' – the preserve of overweight, middle-aged men who smoke, drink, have a poor diet and take no exercise.

## 'Sudden devastation' campaign

"Twelve babies are born in the UK every day with a congenital heart defect, and more than 600,000 people have some sort of inherited heart condition," says Gillespie. "Sir Magdi Yacoub, who was BHF professor of cardiothoracic surgery for 20 years, pioneered a lot of the surgical techniques that are still used today. As a result, we have seen infant mortality from congenital heart disease drop from eight out of 10 before their second birthday to eight out of 10 surviving into adulthood."

The fact that heart disease can affect anyone is the central message of BHF's 'sudden devastation' advertising campaign. One execution, with the endline 'Heart disease is heartless', features a

> " There's no point having a piece of research that generates 10 scientific papers that no-one acts on "

man saying goodbye to his son in a classroom. Only at the end do you realise the man has died. Another features a bridesmaid who collapses at her sister's wedding, with the endline 'When you least expect it'.

These ads are shocking – but in a more emotionally engaging way than some of the BHF's traditional advertising – like the one in 2004 that showed fat oozing from cigarettes and being squeezed out of a clogged-up artery. Such ads helped to pave the way for the ban on smoking in public places that was introduced three years later, and the more recent ban on smoking in cars when children are present.

But Gillespie believed that a more positive approach would serve the charity better than the "finger-wagging" of old, and he has tried to foster more of a dialogue with stakeholders to build engagement. What's more, the strategic review he undertook when he joined showed that while BHF had been the voice that had catalysed anti-smoking initiatives, "we were now one of a number of voices, many of them better resourced than us, and we decided to de-emphasise our public health messaging." The BHF hasn't turned its back on the prevention ▶

agenda, but it's concentrating on two key areas where it has, he says, "a distinctive voice" – smoking and air pollution.

Coincidentally, the BHF's headquarters are in Greater London House, formerly the Carreras Tobacco factory, which made Black Cat cigarettes. An old advert featuring a small black cat sits on his desk as a reminder of how much there is still to do.

"Tobacco use still causes between 20,000 and 24,000 deaths from cardiovascular disease (heart disease and stroke) every year in the UK," says Gillespie. More surprising, perhaps, is that poor air quality is responsible for a further 40,000 deaths, 80% of them the result of cardiovascular disease, according to the World Health Organization. BHF-funded research at the University of Edinburgh has demonstrated not only the links between pollution and cardiovascular disease, but also the mechanisms whereby nano-particles in diesel emissions pass from the lungs into the bloodstream and mass around coronary arteries and blood vessels in the brain. "This is a big issue for us," he says.

## Glacial progress

Gillespie is very keen on collaboration and supporting and encouraging other organisations to do things. One of his aims for BHF when he joined was to have more influence on government, but while "the direction of travel is positive", he is clearly frustrated with what can be glacial progress and the government's apparently contradictory stance on charities.

"We have more direct access to, opportunity to discuss with and, therefore, hopefully influence in, the devolved nations – Scotland, Northern Ireland and Wales – than we do in Whitehall and Westminster," he says. "The ban on smoking in public places and on smoking in cars when there are children present came in first in Scotland, and Wales was the first to do the 'soft opt-out' for organ donations – that is, agreed consent is presumed. So there are areas where we do some good work and effective lobbying with those assemblies, which ends up putting pressure on England to act too."

He is less sanguine about the government's "multifaceted" attitude to charities. "In one sense we are the best thing since sliced bread because we step into areas and pick up things that government funding should be reaching and isn't. We are also 'a great British export': in the medical research sector alone, there are at least three world-leading research funding organisations that

are UK charities – the Wellcome Trust, Cancer Research UK and the BHF – and the government loves that, but we get unjustified beatings in the media and in the form of new regulation."

He admits that the sector does have things to address – not least fundraising practices – but he thinks that while charities are getting their house in order, the government should be encouraging them rather than punishing them. As he points out, this is counter-productive as it involves fines, which consume public donations, and creates negative publicity, which turns donors off. The BHF was fined last December by the Information Commissioner's Office (ICO) for allegedly breaching data protection rules – although it stopped the practices concerned months, and even years, earlier. Despite "a number of strongly held concerns about the process the ICO went through", Gillespie and the trustees decided not to appeal against the fine because the unrecoverable costs of even a successful appeal would have been greater than the fine itself.

> **"In one sense we are the best thing since sliced bread because we step into areas and pick up things that government funding should be reaching and isn't"**

BHF monitors sentiment on a weekly basis, and although trust and confidence took a significant dip in December when the ICO fine was announced, it rebounded quite quickly. YouGov's CharityIndex tracker recorded trust in the BHF in October/November at 51%, making it the fourth most trusted UK charity (after Macmillan, CRUK and RNLI). In December/January, after the ICO fine, it fell by just one percentage point, to 50%, and in mid-July was up to 55%.

But such contradictions are inevitably reflected in public attitudes too. Research by Populus for the Charity Commission, published in July, revealed that the number of people who think charities are regulated effectively has fallen over the past two years. However, there was a 'significant increase' in the proportion of people who said they or their close family or friends had benefited from a charity.

## Focus on stakeholders

Gillespie acknowledges that there is also a perception that big charities are faceless, uncaring and spend too much on overheads, and the BHF is trying to challenge that with an engagement

# WELCOME TO THE FIGHT FOR EVERY HEARTBEAT

strategy that focuses on stakeholders at a local level. But he says that, despite their 'human face', many small local charities are not effective. He pays testimony to the amazing motivation of people who feel inspired to set up a charity after, perhaps, a personal tragedy, and acknowledges their very natural desire to do something to stop the same thing happening to others.

"The difficulty is that quite a lot of these charities start small, stay small and hang on small because they have underestimated the sheer amount of admin required to ensure their systems and infrastructure are up to scratch."

While it's important not to stifle "the remarkable generosity of the British public", Gillespie believes there are too many charities, mainly because there are so few barriers to entry. "New or smaller charities are often dealing with issues that well-established charities are already dealing with – and probably a lot more effectively because they have more experience and considerable

▶economies of scale," he says. There are other ways to channel this philanthropic urge, adds Gillespie, citing the Miles Frost Fund as an example.

The eldest son of the late broadcaster Sir David Frost died suddenly of an undiagnosed heart condition in 2015, aged just 31. The family believes he inherited hypertrophic cardiomyopathy (HCM) from his father, and in January 2016 they launched a charitable fund, in partnership with the BHF, to create a nationwide genetic testing service to try to prevent others dying of the condition.

"The Frost family could have set up a charity in Miles's name, but chose instead to look at what organisations were already operating in this area that could do what they wanted to do, as effectively possible," says Gillespie. "The fund is a restricted fund of the BHF, and it allows the family to have personal involvement – they committed to raise £1.5m – without having to worry about accounting for the money raised, applying for permission and so on, because we do all that for them. It means that all the money raised by the Frost family, their friends and contacts, is actually used to best effect."

Gillespie thinks the Charity Commission could be clearer about recommending other organisations people could approach rather than setting up their own charity. "It could even insist that people set up a restricted fund within an existing charity as a first step, with the right, a year or two in, to establish a full charity, if they meet specified criteria."

Reducing the number of charities would help ensure the donor pound is used better. But have charities become a victim of their own success? Is there a danger of donor fatigue?

"One of the great things about the charity sector is the ability for citizen participation," he says. "I don't think the charity model is broken, but it is pressurised and will continue to be."

Trust, transparency, dialogue and engagement are all critical to charities' continued success, but government interventions aimed at 'protecting' the public can be counterproductive.

Gillespie describes the new Fundraising Preference Service (FPS) as "a blunt instrument," for example. Designed to allow donors to opt out of being contacted by a charity, the complexity involved – different regulations apply to different forms of communication – seems out of all proportion to any donor benefits gained, and could affect beneficiaries. Of the 10 million

> **" I don't think the charity model is broken, but it is pressurised and will continue to be pressurised "**

supporters on the BHF database, just 73 people have signed up with the FPS.

"I think if most donors knew how much charities are paying at the moment to comply with legislation – let alone how much more we are going to have to pay to comply with the General Data Protection Regulations that take effect next year – they would be shocked," says Gillespie.

Another big concern is Brexit, he says: "The UK research base has been a net beneficiary of European funding for many years. If that funding dries up, the money BHF gives to universities for research will be spread more thinly. There's also a danger that some institutions' specialisms may become unsustainable."

In addition, losing the European Medicines Agency to the EU will mean not only a loss of highly skilled jobs and valuable research capacity, but is also likely to result in patients getting medicines later than they need to – at least during the hiatus until European medicines regulations are adopted. Then there's the people side.

"About 20% of our funded researchers are non-UK EU nationals, so we could lose and/or fail to attract some really significant talent during the period of uncertainty over what constitutes 'settled status'. We will also lose the valuable interchange of ideas that comes from people moving between labs in the UK and Europe." ▮

# Circle research

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# A **business** **mind**set

Understanding the motivations of a business audience requires particular research skills – and it is often less about market research and more about solving a business problem. By **Tim Phillips**

**B2B market research is, in many ways, a world unto itself. Clients** may not have their own research expertise, or even much marketing nous – "the marketers we deal with tend to be ex-engineers", sighed one research provider. Respondents are hard to recruit and validate. Some methods work less well or not at all. Budgets are smaller, and you might end up in a testy stand-off with a powerful sales director if you challenge the conventional wisdom.

Clearly, this isn't the sort of research challenge that everyone would relish. But beneath the operational and methodological problems, there's the opportunity to work directly with senior management, genuinely to influence strategy, and become a valued long-term part of the client's business. In short, everything researchers want – but too rarely get – from their careers.

"In B2B, you need to influence a board of directors. We rarely deal with insight directors, so the buyers of our research are non-technical; they use financial, business language," says Roger Perowne, CEO of MIG Global.

Emma Pyke, a director of Kantar Millward Brown's corporate practice, agrees: "B2B research is about looking at the client's central question. They want to understand their propensity for getting more sales or increased market share – but they don't necessarily use those

words. What they are actually saying to us is: 'We want to understand how we're positioned in the market'."

## The business relationship

"The advantage consumer researchers have is that they will have day-to-day experience of a lot of the things they're researching," says Andrew Dalglish, founder of Circle Research. "Our clients want to work with people who get business, rather than people who get research – plus, you're often researching things that most people don't even know exist."

Dalglish has taken on everything from cargo shipping to the sterilisation of scalpels, and the first challenge in every project is to be able to communicate with the client and the respondents in language they understand and respect.

This means the brief will often not be expressed as a research project, but as a business aspiration or goal. Methodology is less important than

getting the job done. Sometimes, Dalglish says, the information they are expected to discover already exists in the business, and Circle's role is to extract data from the organisation's logs or sales records, and make sense of it. At other times, the job involves finding published reports and information from third parties, or it will involve primary research.

This means, at the other end of the project, that the client will have little interest in raw research results. "I've seen a lot of B2B presentations from other agencies that are 100 slides long – full of pie charts. It usually doesn't go down well," says Dalglish.

"Clients are looking for a story and they want that journey to start with the problem they're facing as a business, and what they can achieve as a result of what we've done for them. For example, we usually follow up with a workshop, at which you have top management in the room. You'll have someone from marketing, one from sales, one ▸

from products and another from customer service – all the key people who need to take action. Then we'll facilitate it so they can come up with an action plan."

Clients come back if the B2B research is an intrinsic part of solving business problems, rather than just generating insight, says Pyke. "We've got some long-standing relationships with clients, where we've worked with them for 10-plus years. We're predominantly doing tracking, but – within that – we'll also do other, ad hoc projects for them, or, if something comes up from the trackers, we'll do some qualitative interviews. Our responsibility is to get under the skin of the business a bit more."

The relationship with the respondent can be almost as intimate. For a senior executive to give up an hour of time for a researcher, there has to be trust that

> **" It might be that the only follow-up to our interviews is to call and say: 'That was great. Thanks.' But I doubt it "**

this will be an hour well spent, says Colin Bates, managing director of Customer Champions. Few will take part in a survey for excitement or an Amazon voucher, but they will cooperate if the research has value to them. It might just mean that the respondents expect to see a report, or to be part of any initiative taken on the back of the research – but it could mean they expect to have any issues they raise listened to and reported. In this way, the researcher is also a relationship manager.

"Our clients need to follow these concerns up with their business customers. It might be that the only follow-up to our interviews is to call

and say: 'That was great, thank you. We're all deliriously happy'," says Bates. "However, I doubt it."

## Extracting information

Clearly, business owners, directors or influencers have other things to do than talk to a researcher, so being able to find enough respondents – and to validate that they are who they claim to be – is a major challenge of B2B research. With small sample sizes, a few rogue responses can skew results, especially when fishing in a small pool of decision-makers.

It may be worse to misidentify who is making the decisions in a buying process – which is one of the reasons why companies with an expensive sales cycle often choose to do deep research into key customers (see box, ABM).

A familiarity with hard-to-find respondents counts for a lot. "Reaching these people is what our practice is very good at," says Pyke, at Kantar Millward Brown. "We've been doing this for years, so a lot of our regular respondents are C-suite, FTSE 100. They know us, and know our interviewers. We have really good interviewers, and they've got relationships with the gatekeepers – they know the PAs."

Protecting that relationship means being careful about the content and frequency of research. "We need to make these people feel important, and emphasise that we genuinely need to speak to them. Then we must make sure the questionnaire is engaging," adds Pyke. "These are really insightful people, so rather than just giving them a whole battery of questions, it's about putting an open question, so you give them the opportunity to talk and really share their knowledge."

This is one reason why a higher percentage of B2B research is still done in person or on the phone, rather than online. "You contact them in person because of the response rate you will get. Your entire universe may be a few hundred people and it's, potentially, a very niche group," says Paul Watts, a director at Morar HPI, who has researched B2B categories as diverse as pub landlords and fork-lift truck drivers. "If you are approaching people who drive fork-lifts, you could try to do some of it through online panels, I suppose – but, realistically, you have to do most of the work on the phone."

Panel quality is a universal headache for researchers, but there are understandable reasons why B2B panels are hard to create. The first – as above – is that the motivation to take part in research may be about deepening relationships, rather than a financial incentive. Another is that a job title alone gives little insight into the role that the respondent plays in his or her

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## A TWO-SIDED PLATFORM VIEW FROM RIGHTMOVE

"It's easy to forget how complex the life of our agents is," says Suzanne Lugthart, head of research at Rightmove. "In every project, we have to think about what we're doing and how it might affect the estate agents, or how they might feel about it."

Rightmove is part of an emerging category of businesses that act, primarily, as two-sided platforms. Although a feature of the offline world – auctions, street markets and cooperatives are two-sided – matchmakers have flourished in the internet age. Amazon, Airbnb, eBay and Uber function in this way, but so do many other business models – such as games consoles, or even the market for organ transplants. These businesses have huge start-up costs and, in the commercial world, most fail.

Matchmakers are the intermediaries that bring buyers and sellers together. Attracting customers (house buyers) is important, but it is useless unless those customers can be matched with providers (estate agents). In the B2C world, we are accustomed to thinking about competition in the market, attracting a larger share of the consumer's wallet. For a platform, competition is also for the market, attracting a larger share of the provider's commitment – and one optimal outcome is to become a monopoly provider by attracting all possible B2B clients from its rivals.

Inside this type of company, the internal salespeople who speak to the providers are often powerful influencers on strategy, and the guardians of much useful informal feedback. Rightmove supplements this with a rolling programme of B2B research, which has to be undertaken with care. "Estate agents think portals have taken away part of their value chain, so, when we talk to them, it is a chance for some of them to get stuff off their chest. But we'll always go to them again and have the conversation about how we can improve – which is the conversation we really want to have," says Lugthart.

As with many other B2B operations, Rightmove relies less on the headline figure from its NPS tracker for B2B because "it was bouncing around all over the place". This was partly because of small sample sizes (Rightmove has 10 million buyer visitors per month, but only a few thousand agencies to track) and partly because the emotional response tended to swamp the rational feedback. But, in addition, the explanations behind the scores were far more reliable as a guide to improving the business than the scores themselves.

Effective research combines operational business metrics with an emotional side. "We started by defining what value looks like to agencies, and that is a mixture of rational and emotional," Lugthart says. "Rational would be things such as the quality of the leads that we send to agents – the quality of the data we supply to allow them to target their markets.

But we also need to take notice of how they feel about us."

For emotional responses, a regular panel of telephone interviews is combined with surveys using metaphorics; for example, agents can place themselves on a virtual sofa, which measures how close they sit to a man wearing a Rightmove T-shirt and to competitors, such as Zoopla, to examine how close the relationship is, and what would secure or threaten it. Simply doing the research helps to deepen trust and commitment in the relationship, and Rightmove now prioritises training to agents.

"We spent a lot of time helping to identify the moments in the home-moving process where technology adds value, rather than detracts from it. We want to be seen as a business that enables home-moving, and tries to make it easier. So we've synthesised research from consumers and estate agents, and turned that into advice for consumers and training materials for estate agents, which, hopefully, will make the whole process smoother for everybody," says Lugthart.

Does she have advice for platform companies in a similar position? "It's really important to have a proper research function to complement the feedback you hear from a big sales force that's talking to customers all the time. Combining that with research rigour means you don't just listen to one or two people who are particularly vociferous."

employer's business. Respondents may conflate emotional, personal responses with replies that are relevant to business research (see box, Rightmove), and this may be impossible to disentangle without personal contact. With the increasing amount of self-employment, even legitimate small and medium-sized enterprises (SME) panels contain a highly diverse group of people. Finally, professional respondents will find it just as easy to piggyback on a business panel as a consumer one.

In the real world, however, if a panel provider claims to have found a large number of business owners or executives for an online panel, it's tempting not to ask too many questions.

SSI is one of the world's largest providers of samples for research – with 18 million panellists in 90 countries – and so one of the largest suppliers of online B2B panels.

"The B2B market, globally, is big – it's growing – but it's probably one of the most underserved markets," says Chris Fanning, president and CEO of SSI. When he joined the

company in 2012, developing higher-quality B2B panels was made a strategic target, based on his experience with poor-quality B2B panels in a career outside the research industry.

"One of the dirty little secrets of our industry is that some of the smaller, less resourced, companies out there are probably trimming

> **The B2B market, globally, is big – it's growing – but its probably one of the most underserved markets**

back on their panel assets, offering cheap samples. I know, I've seen it first-hand. Some panel recruiters grab traffic from a lot of sources and just kind of throw it at the survey. They ask potential respondents: 'What do you do for a profession?' – or, worse, 'Are you an IT decision-maker?' And people know the right answer is 'yes' if they want to take the survey."

Currently, SSI is investing $100m a year in growing its panels, much of it to weed out these fraudulent respondents. Recruitment for B2B concentrates on externally verifiable sources. For example, airline frequent-flier programmes offer opportunities to validate identities, and a global sample. "If you're getting those miles and points, you tend to be honest about who you are and where you live," Fanning says.

"We also recruit on professional publications and websites. So, if you're looking for IT professionals, our customers want specific samples; they want Java developers Oracle database administrators – pretty specific topics."

This is one reason, Fanning claims, that B2B panel recruitment needs to be done at scale. The other reason, he says, is that by examining previous survey responses, SSI finds it easier to weed out imposters. There's a process of continuous validation in doing more than 40 million surveys a year.

Fanning was not the only person we spoke to in the B2B research business to admit that bogus B2B

## MAKING SURVEYS INTO MAGAZINES

"We have been toying with different ways to do longitudinal research and trying to make our surveys slightly more editorial – more discussional and more community-based – with people providing ideas, getting feedback and coming back to find things out," says Alex Wheatley, innovation researcher at Lightspeed. "That ended up with the idea of survey magazines."

So BusinessMinds was born, a monthly collaboration between Lightspeed and Kantar TNS, directed at the hard-to-survey SME market. The idea was to supply a survey in the form of a magazine, which would offer businesspeople something of value. "It gives them a reason to be there, because these people are time poor and only want to participate if there's something to gain from it," says Wheatley.

The discipline of a magazine structure was useful, says Jon Puleston, Lightspeed's vice-president of innovation, because it made the team think about the complementary nature of editorial – what's provided to engage the reader – and advertising – what the publisher gains from the exchange. "The challenge in all forms of research is trying to think like a publisher. It is a skill to understand what a market wants," he says. "Researchers often tend to treat respondents as a group from which we just want to extract information, and it's not a collaborative process."

The timing was right for BusinessMinds because it coincided with the Brexit referendum – and, in its early surveys, it found that four out of 10 SME's backed Brexit. The longitudinal format meant the team could perform a before-

and-after analysis of opinion. Brexit wasn't the only editorial strand, however. Readers were asked more open questions; for example: how would they invest £1m in their business; what would they like to do on a company night out; or how do they manage their work-life balance?.

Initial response exceeded expectations. Puleston says: "SMEs are humans and they treat their businesses like a member of their family. We were amazed at how much feedback we got from people when we asked about what it felt like to run a business, and the concerns they have.

"In future, you might get hundreds of thousands of people engaged in a survey if the survey's right – and they'll do it on a regular basis because they're enjoying it, not necessarily because they're getting paid to do it."

Finding that long-term business model for BusinessMinds will be more complex, though. The ideal would be for a selection of clients to sponsor it; however, clients with needs that suit an editorial format, and who would be prepared to make a long-term commitment, may be hard to find.

"We are not continuing it at the moment," says Emma Mozley, associate director at Kantar TNS. "We are including it in our B2B briefs, and there has been some interest, but it's a big commitment of time for the client, and it needs to be the right kind of brief."

"We're at the stage where we probably need to build it without the commercial angle in mind," Wheatley suggests, "and have the magazine – the idea – running, and go to our clients at that stage. But, obviously, that will require investment."

panels are the industry's 'dirty secret'. The alternative – building and curating your own panel, and syndicating it to many clients – can be a consistent source of revenue because, by definition, it is almost impossible to replicate. But it's hard work to build a specialist panel, says Perowne, of MIG Global, which built a panel of broadcast engineers that was extremely valuable as a

> **B2B companies are now catching up with B2C in terms of recognising the value of regular customer feedback**

source of insight for high-value equipment providers.

"We globally partnered with all the major broadcast shows and the major brands – 20 different publications. Because of this approach, we got huge numbers. It was a collective effort. But there are only 30-50,000 broadcast engineers

in the world, and we had to go through every channel to get to them. You can make this work, but it is hard to do, and you have to take a syndicated approach."

On the other hand, at least, Perowne could be confident of who was responding – and why – and make that a selling point. "The industry has to be a lot more honest here," he warns. "A provider could easily validate whether the people on panels are who they say they are by using LinkedIn to check – but I don't know a single panel provider that does it."

## Not all methodology will work

With small sample sizes, the need to know (or find out) precisely who you are talking to – and the more open-ended or qualitative research – means some techniques have to be discarded or adapted in B2B. One example that's commonly measured, but not used effectively in B2B settings, is Net Promoter Score (NPS). It's much harder to work out what the number actually measures

in a B2B environment. Does it capture the quality of the business relationship, or the emotions of one person at one point in time? What does one person's response signify, compared with the wider business partnership? In short: is the NPS question capturing something that the business can, and should, act on?

At Customer Champions, Bates has seen increasing requests for NPS, but he usually discourages them. "The good thing is that B2B companies are now catching up with B2C in terms of recognising the value of getting regular customer feedback – but it would be rare that I would tell them the answer to their problem is NPS, because the value of each customer is of great significance to them. What they really want to look at is how to respond to customers on an individual basis."

As a result, Customer Champions treats the NPS score more as a conversation starter – a way to say: 'Why do you score us that way', delivered in a face-to-

## ACCOUNT-BASED MARKETING (ABM)

CSC, a US-based technology and services company, thought it knew its biggest customers well. It did some research into their buying process and discovered that, on average, about 30 people would contribute to it, and that even its best salespeople knew only a small fraction of them. When McKinsey surveyed 200 business customers, their biggest complaint was a lack of knowledge among the people who sold to them, while 55% said they were contacted too frequently.

One of the problems is that service providers such as CSC have the wrong type of information. If the sales process is long and complex, it's not always useful to know about the person who signs the purchase order, the opinions of a panel drawn from many companies, or historical research.

So, particularly in technology businesses, the discipline of

account-based marketing (ABM) has evolved to research 'markets of one' – key accounts – in the sort of depth on which salespeople can act.

"We've formalised an approach – a structured approach to market to individual accounts – treating accounts as markets in their own right. Over time, we've evolved the model," says Dave Munn, president and CEO of ITSMA – a B2B services marketing association – and the co-author of A Practitioner's Guide to ABM. For the companies who use it – predominantly B2B ones in technology, for whom the sales process can last 18 months or more, and involve huge up-front investment – ABM is extremely effective.

"In our surveys, 87% of users said it has a higher return on investment than other forms of marketing. Close to 75% of companies we survey are increasing their spending on

account-based marketing," Munn says. The key is to disaggregate the research process.

"Many companies will decide on 1,000 target accounts and target CIOs or sales leaders in those companies. They develop mass content – mass programmes – and it really doesn't speak to the individual issues and needs that people and companies have," Munn adds.

Instead, the information-gathering effort for ABM tends to be a deep dive into one client, or a few, to discover: who influences the process; when it begins; what their specific problems are; attitudes and opinions from every influencer inside the client; what those named influencers are considering; and whether there is a realistic chance of growing the account. This means salespeople can target fewer, more promising, opportunities, and influence the sales process at the start, rather than just responding to a tender.

How does this change research needs? It is important, Munn explains, not to do key account research in an ad hoc or project-based way, but as a continuous, measured, planned process. "Some people just start jumping in and doing random acts of account-based marketing – and those can work, but it's not very structured," he says.

The deep-dive data looks at every aspect of the customer, including social media, company news, propensity to buy, company performance or search data. Some of the information may already be available, but it can be distributed between many departments, and needs to be collected and formalised. It is then delivered in a timely way – which is often automated – to the correct salespeople.

"This kind of specialist information gathering is bringing daily intelligence to the planning process," Munn says.

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face interview. It can calculate the aggregate NPS score for clients, but – because of the small sample size – the number is likely be volatile. Even if it doesn't move around, it is hard to work out in a B2B setting what the client can do to move the number; it's rare that the B2B process will uncover one surprising common problem, says Bates.

However, scoring in this manner might also be a way to select the B2B respondents that the client needs to re-contact. Bates calls these "red flag reports", which he is more likely to recommend than a simple NPS tracker. "With these reports, an account manager or a project manager in the client business has the responsibility of contacting the person we interviewed. It's very actionable research, and the value is often about opening up channels of communication."

This may, Bates says, also be a welcome innovation for those account managers who have been raising their own red flags internally, but who now have rigorous third-party confirmation through an external B2B researcher. It's a long way from using an NPS tracker to improve relationships, he claims, but – in a B2B context – it may be more useful to the client.

If B2B research respondents don't like joining panels, responding to standard quant surveys, or being asked to boil down their responses to a number between one and 10, then – at the other end of the methodological spectrum – there's in-depth qualitative or ethnographic research. But, doing 'ethno' in a business environment isn't straightforward.

One obvious point is that customers won't enjoy – or, legally, cannot have – an external researcher hanging around in their offices. So B2B ethno requires problem-solving creativity, says Sabine Stork, founding partner at Thinktank International Research.

An example of Thinktank's creative solutions in a B2B context is a project in which researchers based themselves at Shell service stations, to speak to truckers on a break or salespeople as they passed through in their cars. But research time was limited, because truckers and salespeople are on the clock.

"It is difficult to interview anyone at length at their place of work in large corporations," Stork says. "A lot of the problems in B2B research are just pure logistics."

If an ethnographer's skill is to observe, there's also the problem

that – in a work environment – staff may find this sinister.

"As a researcher, you just want to observe employees at a lower level in the company, but there will be suspicion about why you are doing it. You still pick up important contextual stuff just by looking around, but they may not want to tell you directly," says Stork.

"One idea is to approach them in work situations, but not actually at

> " It is difficult to interview anyone at their place of work... a lot of the problems in B2B research are logistics "

work – which is why we sometimes talk to people at conferences. Perhaps they will feel a bit freer in this environment."

In all aspects of B2B research, the researcher's empathy with respondents matters – but, again, this means understanding something about the work that those respondents are doing, whether that be broadcast engineering, running a company or driving a lorry. Before every B2B

## TARGETED RESEARCH AT EPICOR

"We look at its client industries, their growth, their characteristics. We don't necessarily talk to the most senior people in the client, we look at a broad spectrum of relevant people," says Paul Watts at Morar HPI.

IT companies are some of the largest consumers of B2B research, because their products are general-purpose technologies that are purchased in the boardroom, implemented in an IT department and used by everyone.

This is certainly the case at Epicor, one of Morar's long-term clients, which supplies enterprise research planning technology that, in effect, runs the businesses of mid-sized companies,

especially manufacturers. Epicor and Morar are on the company's tenth global survey since 2010, says Tabita Seagrave, director of communications at Epicor.

"The surveys and research we do are very targeted. We need to understand what kind of roles people have, because we don't sell to everybody in every role in every company."

This means the flexibility to reach boardroom respondents, as well as to target users of the software, who may be informal drivers of purchasing decisions.

For Seagrave, one of the most important aspects of the survey is that it allows Epicor to be precise about who the respondents are, what jobs they do, and where

they are. Although it is a global company, it sells to a multitude of sectors in various countries, and the sales process changes in different contexts, because industries and countries report unique pain points.

The longitudinal aspect of the survey has one surprising aspect in common with consumer research: demographic change. In many mid-sized companies, Seagrave explains, control is passing from an older generation to a more digital-native group of managers, and the attitudinal shift to technology is a focus of the research.

"Most of our customers are going through a big generational shift. The new generation of

managers is automating, and there are lots of big digital changes happening within the industry at the moment."

One of the satisfying aspects of the global survey programme, says Seagrave, is that it is done only because it is useful.

She personally reports the results to the CMO, and these are then used in strategic planning and marketing, and to direct sales.

"In B2B organisations, there is a lot of transparency inside an organisation, so all the research we do is measured and tracked, and we have KPIs for everything."

It means Epicor is constantly looking for actionable information that others have missed.

▶assignment, Stork researches the elements and the language of the jobs she will be observing, so she can speak to workers in their day-to-day language. This, she points out, also helps her to recognise what, precisely, is going on in the workplace.

"You need to have your emotional radar on. I think you do need to have a business demeanour and try to speak their language to do this type of research," she says. "I always say to them: 'Treat me like an informed layperson.'"

But clients already have a group of informed laypeople doing continuous research into their customers – the sales team. There's a reasonable case to be made that a sales call is qual research by another name. Then, B2B has both an opportunity and a responsibility. On the one hand, accessing and aggregating that internal reservoir of internal insight can be a valuable source of understanding – but the responsibility to challenge the accepted point of view of the sales team, if the research points that way, can be politically delicate.

As an 'informed layperson', Stork argues, a good qualitative interviewer can do that job for a B2B relationship. "It's being able to ask the 'stupid question' that really allows people to be a bit more honest – a bit more frank. It's one of the reasons it's a good idea, in the first place, to use qual for B2B clients," she adds.

## A different type of research, a different type of researcher

Because the requirements of B2B are often so different from those of consumer research, not every researcher may be suited to it. "We've pretty much stopped recruiting people with a research background," Dalglish says. "We either recruit them straight out of university or from management and marketing consultancies. Those candidates are trained in business rather than in research, and it is relatively straightforward to learn research – whereas it is not straightforward to learn business."

Dalglish's three-stage recruitment process includes a round that tests the business acumen of applicants specifically. "To do this job, you need to be interested in the worlds of business and commerce," he says. "That's because – in B2B research – you have to be able to unpick a complex environment, in which different businesses are interacting with each other, and come up with commercial recommendations."

"I try not to take an approach where you can say: 'This is where the research bit fits in'," says Bates, of Customer Champions. "When I look at this [B2B research], I always think: 'This is not really market research – this is much more about understanding a few really, really, really valuable customers.'" ∎

# FINDING A REASON TO RESPOND

Respondents are a market researcher's raw material. Without them, an industry focused on exploring people's opinions would have no opinions to explore.

Sourcing these raw materials is a challenge for B2B researchers. Respondents are a scarce resource, especially when niche or senior-level roles are the focus of the study. What's more, securing the support of these individuals is notoriously tough. They can be protected by gatekeepers, they are time pressured, and their primary responsibility is to further their employer's business, not yours.

But, with the right approach, B2B respondents can be persuaded to take part in research. So, what's the trick? It's all about incentivisation; you need to give respondents a compelling reason to support the research.

The most powerful of these incentives are 'soft'. There are exceptions, but most of the time in B2B markets people are buying from people. What's more, this relationship tends to endure beyond the sale through to activities such as product tailoring, service delivery, account management and ongoing support. The result is that, in B2B markets, buyers and sellers often forge a human bond; leveraging this relationship is the most powerful incentive when persuading someone to take part in research.

Another powerful soft incentive is to appeal to people's sense of curiosity or desire for mental stimulation. If the topic of research, or the way in which you are exploring it, can be made to sound interesting, then people are more likely to see value in giving their support. If you also emphasise how participation will benefit them and their employer through innovations or service improvements, all the better.

A third soft incentive can help to smooth the way. Remember that B2B respondents are time poor, so you're more likely to gain their support by placing as little demand on their time as possible and making participation easy.

These softer factors aren't always available, or may not be powerful enough on their own. So sometimes a more tangible incentive is needed – and a common approach is to offer a financial reward for the respondent's time. However, this is quite controversial, with critics citing three main objections. First, exchanging cash for opinions can seem distasteful in a business context, and – in some circumstances – may fall foul of corporate bribery laws or policies. Second, putting these ethical concerns aside, it's an expensive approach, especially when senior, well-remunerated roles are the target. And third, not everyone is convinced that making such payments improves response rates.

If you share these concerns, there are alternatives, most notably charity donations, prize draws, or information – usually a short report based on the survey findings. These aren't all equally powerful, though.

To explore the impact of these incentives on response rates, Circle Research divided a database of more than 23,000 business people into several groups, then invited them to participate in a short online survey. Group one, the control group, was offered no incentive; the remaining groups were offered one or more incentives. The results were clear cut. The most powerful 'hard' incentive was to offer a charity donation: 53% of all survey respondents in this experiment came from just two groups – those who were offered a charity donation in exchange for their time (29%) and those who were offered this charity donation in conjunction with entry into a high-odds, low-value prize draw (24%).

So, if you're looking to persuade B2B respondents to participate in research, use a mix of soft and hard incentives. Leverage the relationship, appeal to their curiosity, make it easy to participate, and seal the deal with the offer of a charity donation for their time.

**Andrew Dalglish**, director, **Circle Research**

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# Key takeaway

McDonald's has recently introduced changes to its restaurants, some of which have had surprising consequences, as **Victoria Hodson**, its vice-president of business strategy and insight, explains to *Jane Bainbridge*

McDonald's is a brand that engenders as much criticism as it does love. Over the years, it's gathered more than a few negative headlines. From the 'McLibel' case in the 1990s, when it took two environmental activists to court, to – in the past few months – the first strikes by UK staff over zero-hours contracts and conditions; these are not the stories big brands covet.

But alongside the media storms has been the business success, not least after Briton Steve Easterbrook took over as CEO in 2015. McDonald's has enjoyed 45 consecutive quarters of sales growth in the UK, and a distinct sharpening of its global business strategy.

In interviews, Easterbrook has cited a number of factors in its improved performance, including: investing in the menu; refocusing on its 'value' proposition; and making sure improvements – be they in staff, service or interiors – are evident to customers.

Since the McLibel debacle, McDonald's has adopted a strategy of being more transparent – and this was before transparency became the go-to business buzzword – in a bid to take on its critics. From its campaign to address the repeatedly peddled rumours of shocking farming and food preparation practices (see box, Good to Know) to its swift retraction of the 'Dead Dad' ad after criticism that it exploited child bereavement,

there is an honesty to the company's approach.

Victoria Hodson, McDonald's vice-president, business strategy and insight, acknowledges that a change of focus was required and that the company was "in a very difficult position" in 2005.

"Trust was very low and some big decisions were made at that time that have set the bedrock for where we are now. It's one of the reasons I was attracted to working here," she explains.

Part of that, says Hodson, was making changes to its supply chain. She cites the dividends this paid during the horsemeat scandal that hit the UK food industry in 2013. While many big-name food companies found their products, and reputations, tarnished, McDonald's was one of only two firms to be named as upholding best practice thanks to its long-standing relationships with suppliers.

One of the biggest appeals for Hodson, however – and something she's carried on since joining McDonald's in 2013 – was "the fact that the customer sits at the heart of everything".

"It's fundamental. To be able to sit round the executive team table and to influence every conversation, every decision that's made. It demonstrates how important the customer is to McDonald's, to its decisions and strategy."

The fact that business strategy and insight are under Hodson's remit is promising in itself. As ▸

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### FACT FILE

- In 1940, Richard and Maurice McDonald opened a barbecue restaurant in San Bernardino, California
- The first franchise, using the arches logo, opened in Phoenix, Arizona, in 1953
- Ray Kroc joined the business

in 1955 and bought the chain from the McDonald brothers
- It now has 34,000 restaurants worldwide, and employs 1.8m people
- It opened its first UK restaurant in Woolwich, London, in 1974

- In the UK, it has 1,200 restaurants, employing 97,000 people
- About 70% of its UK restaurants are franchises
- More than half (55%) of its ingredients come from 17,500 British and Irish farms.

well as having responsibility for consumer insight – which looks at everything from long-term reputation tracking, product development and customer experience – she has business performance to consider, too. The business insight team looks at sales forecasting and works with marketing on understanding promotions and campaigns to help with planning.

Hodson says head office is a lean outfit with a small core team that draws on external agencies, which often involves outside personnel coming to work at McDonald's on secondment. She thinks the company's habit of maintaining long-term relationships with suppliers is as valuable in marketing services as it proved to be on the food side of the business.

"Franchisees have to sign up for 20 years – nobody's in it to make a quick buck, everyone's in it for the long term. So it gives us a chance to work with our longer-term agencies on some bigger, more exciting, more unusual projects, which perhaps would be risky with a new agency," she explains.

That said, one of Hodson's recent objectives for her team is to be open to new agencies, and to make sure they are constantly innovating and looking at new methodologies.

McDonald's transparency won't stretch to Hodson discussing which agencies she works with, however, and she prefers to focus on the work they, and the insight team, have done that has influenced the business.

## Home delivery

One of the most significant recent changes has been the introduction of McDelivery – its home-delivery service through UberEats, which has been available at selected UK restaurants since June. Easterbrook had cited delivery as one of McDonald's 'key accelerators' – and, with 75% of the population in its top markets living within three miles of a McDonald's, it's easy to see why extending its service to home delivery had the potential to boost the business. Especially as people, typically, spend between one and a half and two times as much on deliveries as they do in a restaurant.

Hodson says finding the right partner was crucial with home delivery. "It's something our customers have been asking for, at least as long as I've worked here. For us, it was about when the time was right and finding the right partner to do it properly – speed is really important," she says. "We're piloting it in 150 restaurants at

the moment; that's where we learn all our operational glitches. What goes right, what goes wrong, and how we iron those out. It's going really well and customers love it."

McDelivery is just one of several new services the fast-food chain has introduced, all of which have been a direct result of research into what customers want from the brand.

For instance, its mobile ordering app – now available in 250 of its restaurants – means customers can order at their table or at home, and the order is only activated once they scan a code at a digital checkpoint in-store.

This ties in with the company's 'experience of the future' strategy, a major operational change to update its restaurants and transform customers' experience of McDonald's. Behind the scenes, changes to its kitchens have meant McDonald's can personalise items on its menu,

**RIGHT** McDelivery and a mobile ordering app have made it even easier for customers to buy their Big Mac

**FAR RIGHT** The new order kiosks in McDonald's restaurants have led to customers choosing healthier options from the menu

**BELOW** McDonald's director of football Sir Geoff Hurst (centre) at the Bookham Community Football Day
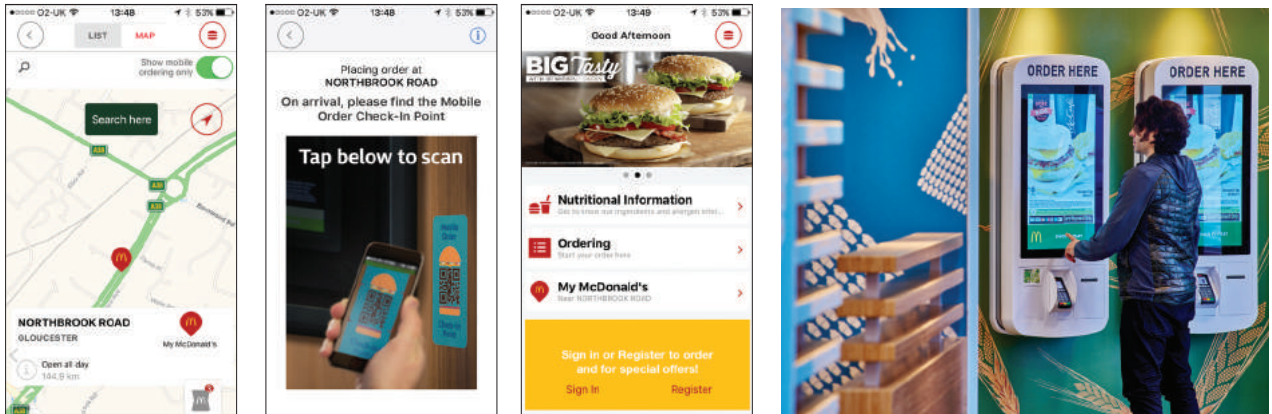
allowing people to add or remove ingredients.

Meanwhile, in the redesigned restaurants – 850 of its 1,275 have been converted so far – large digital ordering screens, which it refers to as kiosks, mean customers can take their time browsing the menu and ordering.

Hodson points out that qual research was vital in developing these changes – not only in determining what customers wanted, but also in the finer details during the pilot programme.

"The way we developed our new restaurants – with kiosks, the new order and collection points, table service – was that we had the idea, we did lots of qual studies, then we started piloting," she explains. "This is the way we often roll things out. We then did lots more studies in the restaurant; we watched people go through [the ordering process] and looked at where they'd get stuck." As a result, it could adapt the interface on the kiosk screens.

## Menu selection

One of the most significant consequences of giving people a different method of ordering has been its impact on the food choices that they make. Previously, with space limited above the tills, the entire menu wasn't easy to access quickly.

"It's started to shift consumer behaviour toward our healthier options," says Hodson. "Often, people come into McDonald's because they haven't got much time – so what do you do when you're pressured for time? You opt for your usual. One of the greatest things that customers tell us about these [kiosks] is, 'I'm not pressured about that decision and I've got the time to choose'."

For instance, Hodson says, more Happy Meals are being bought with carrot sticks and fruit

bags, while sales of salads have risen and wraps are doing well. But ongoing tracking is vital to identify when radical changes such as this are needed, and to monitor their success.

This year, Hodson introduced a new customer-satisfaction tool, called Food for Thoughts. Customers complete an online survey after visiting a restaurant to give feedback on their experience. "It's a very simple question to start with and, then – every tenth person – we'll deep dive into different parts of the experience or parts of the meal," she says.

"What we don't want is someone stuck on their phone for 20 minutes when they've only spent five minutes in the restaurant. It's not the right ratio of effort to output. If somebody hasn't marked us very well, we will follow up and ask them more questions."

The responses are mainly used by restaurant managers to improve their customer experience, rather than at a business level. "Each restaurant has its own quirks of where service doesn't always go well. If you aggregate it up and then try to performance manage people against those aggregate scores, it doesn't make sense," Hodson explains.

McDonald's has succeeded in treading a fine line between global uniformity and recognising local market requirements. So, while its core menu means travellers in far-off countries can visit a McDonald's and be safe in the knowledge that they'll recognise the menu, it also has regional tweaks to meet local sensibilities.

A recent addition to the menu is a direct result of customer research. While burger restaurants have grown in popularity in the UK, much of the expansion has been at the gourmet end of the market. This trend has led to McDonald's introducing its premium ▶

▸Signature Collection, consisting of a thicker burger in a brioche-style bun.

Hodson says: "That was properly starting with a blank piece of paper and customers in a room, talking to them about great food. We talked, specifically, about beef and what constitutes a wonderful beef sandwich. Then we went to concept testing.

"We used research in a different way there, to refine what that might look like. The thicker beef patty was the real constant that customers kept telling us about. Eventually, we came to what we have now – which is a brioche bun and quality ingredients."

The collection was piloted for almost two years before the company decided to expand it, and it's now available in about half of McDonald's restaurants.

While Hodson acknowledges that the company "doesn't always get it right", she says it does respond to customer feedback and looks at what it can do to improve. Every year it conducts a strategic review to look at the bigger picture – what the influences are; the operating environment; the economic situation; the political situation; and so on.

"We'll look at all of those aspects each year, to make sure we're still pointed in the right direction," she says. "We will adapt our strategy if we need to – if some of those things are no longer right, or some are now right, such as delivery.

"We look at trends – are they definitely trends, or just fads? We'll use research and insight to help us with that, and then we'll use some good old-fashioned business common sense." ∎



## GOOD TO KNOW

Research showed that some people were questioning how food at McDonald's is made, with misinformation circulating about what happens to ingredients between leaving the farm and being served in the restaurants. Social media ensured these myths gained currency among young people.

So, in May 2015, the company launched an integrated campaign platform called 'Good to Know'. Through broadcast – and Leo Burnett's 'The Cow' TV ad – it started by challenging the common assumption that McDonald's burgers aren't made with 100% beef. Further executions looked at 100% British potato fries and McNuggets.

It also worked with YouTubers, inviting them behind the scenes of its supply chain and restaurants, to ask suppliers – and employees – questions on behalf of their fans, and then post videos on their findings. In the second half of 2016, more than three million young adults watched this YouTube content.

In an effort to reach parent influencers, the company worked with Barry Lewis from Jamie Oliver's FoodTube network. He recorded a behind-the-scenes video designed to reassure parents about what goes into the food.

The company attributes the Good to Know approach to its improved food-quality metrics: *Good food quality* has reached its highest ever level (from 35% to 46%); *Top-quality ingredients* (from 33% to 45%); *Food I feel good about eating regularly* (27% to 37%); and *Nutritious food* (26% to 36%) – all scores from Q4 2014 to Q4 2016.

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# Evidence in action

The NSPCC's **Kate Stanley** tells *Robert Langkjær-Bain* why establishing measurable targets is key to its work

T he NSPCC knows it can't end child abuse alone. Its annual income of £130 million isn't nearly enough, and only a fraction of cases of abuse are ever reported.

For this reason, the charity wants everyone to take responsibility for keeping children safe. And that means a huge part of its role is to influence others, and constantly to prove the value of its work to the many thousands of supporters, partners and volunteers who help to achieve its aims.

This means everything the NSPCC does must be supported by evidence. The woman in charge of making sure that happens is Kate Stanley, director of strategy, policy and evidence.

"Evidence has informed our strategic direction, and our strategy is both to generate and use evidence for the benefit of children, and encourage evidence-based policy-making," says Stanley.

It's fair to assume that the NSPCC's work since it was founded in 1884 has played a big part in the significant declines in child abuse that Britain has seen in that period. But until recently there was little detailed evidence of the charity's impact.

Now the NSPCC has begun tracking its progress against key measures in an annual report, and last year it published a five-year strategy including dozens of measurable targets against which it will gauge its progress.

"My role is to make sure we're using our resources to focus on achieving the activities that will help us accomplish those outcomes," says Stanley. It's going well; the charity aims to reach five million children in five years, and Stanley thinks they may hit that target in just three years.

Specific targets include visiting every primary school in the country with the 'Speak out, Stay safe' programme, and answering 50% more calls on the charity's helpline for adults.

> We realise we can't reach everybody, so our model of change is about testing and piloting approaches to see what works and what doesn't

Not all the measures are perfect – some are based on actions the charity will take, rather than measurable results of the impact of those actions. Stanley says: "This is step one on that journey of improving our ability to measure the impact we make. Im really proud of our progress in holding ourselves to account – I'd like to go further faster, and we'll only know if we're succeeding if we measure how we're doing."

One of the key ways evidence guides the NSPCC's work is by assessing the relative impact of intensive and light-touch interventions. Individual social care can change the lives of a few thousand children, but an awareness campaign delivered through schools up and down the country has the potential to reach millions. Knowing what works allows the charity to strike the right balance and make the best use of its limited resources.

Stanley says: "We have an evidence team that evaluates our own services so that we know the things we're doing are making a difference for children. It's very easy to assume that because you're a charity and want to do good, that you will do good. But we know that wanting to isn't enough, and that it is possible to do harm. So we're very assiduous in assessing the value of the work that we do and learning from that."

The next role of evidence is to support others in helping to stop abuse. "The NSPCC has been around for 125 years and we spent a lot of those years explaining to people that abuse existed, that it was a bad thing and that there was a lot of it," says Stanley. "People get that now. The next step is to show people how they can help. Evidence is part of how we bring people on that journey.

"We realise we can't reach everybody, so our model of change is about testing and piloting approaches to see what works and what doesn't, so we can then share that learning with others, that they might then take that forward and scale it up, because we know others have much greater reach than we can achieve. That model is very much dependent on achieving evidence that is persuasive and that people can use."

## Trusted source

The charity's brand tracker, run by YouGov, has shown an increase in recent years in the number of people who believe that child abuse can be prevented, suggesting its message that everyone can help is getting through.

Key audiences include government, other charities, businesses – such as O2, which helps promote online safety – and the network of professionals the charity works with, including teachers, social workers and midwives. "They tell us that evidence and research are important to them and that we're a trusted source," says Stanley.

Many of the NSPCC's behaviour change campaigns rely on parents, teachers or others to disseminate a message – for example the PANTS campaign encouraging parents to talk to young ▸

## CV

### KATE STANLEY

**2012 – present**
Associate head of the strategy unit and later director of strategy, policy and evidence, NSPCC

**2012 – 2015**
Trustee, Hope and Homes for Children

**2011**
Fellow, Clore Social Leadership
Conducted research on using film to bring about social change, as part of a 12-month fellowship

**2003 – 2010**
Deputy director, Institute for Public Policy Research

**2001 – 2003**
Researcher, Save the Children

**1999 – 2001**
Programme manager, Response International

children about 'the Underwear Rule', that focuses on their underwear being private.

"Everyone can play their part in ending child abuse," says Stanley, "which means that, in a sense, everybody is our audience."

In some cases, the evidence the NSPCC would like to have simply doesn't exist. For instance, it's eight years since a survey of the prevalence of child sexual abuse was conducted in the UK. That was carried out by the NSPCC itself, at a cost of a £250,000, but the charity can't afford to repeat it regularly.

"It's a frustrating gap in knowledge, which makes it difficult to make sense of what we do know. For example, reports of children being emotionally abused have risen by 200% in the past seven years. Good news or bad? Without knowing how many cases go unreported, we can't be certain."

Last year, former Sheffield United footballer Andy Woodward became the first of 20 players to speak out about abuse by coaches when they were boys. A sign that people are becoming more willing to open up about past abuse? Perhaps. But how many remain silent?

"We don't know the scale of how much more needs to be done," says Stanley. "More reporting [of abuse] doesn't mean there's more of it, but it's very difficult to make that distinction clearly because it just sounds like a geeky side issue, when it's actually a fundamentally important point."

The NSPCC is now calling on the government to begin regularly surveying the prevalence of sexual abuse, just as it does for other public health issues. The question is particularly important in the context of recent cuts to social

> **How we connect with our supporters has changed dramatically in the past couple of years, and will further, because of changes to the legal guidance**

care budgets, which have left services stretched. This means that, even if abuse is reported, the necessary support may not be there.

The impact of public spending cuts is a complex and highly politicised issue, says Stanley, but "there's no question that social service departments are under massive, massive pressure. And it's not good enough to suggest that we can reach all the children that we need to help through social services, because they simply don't have the resources to do that."

The NSPCC has more than 30,000 campaigners in the UK





Recently, the NSPCC teamed up with the Economic and Social Research Council (ESRC) to fund four major projects looking at how to help abused children get back on track (see box). By pooling resources and looking at topics of common interest, this has enabled the charity to invest in major, top quality research on key issues, with £1 million contributed by the NSPCC and £700,000 by the ESRC.

Academics were invited to propose ways of addressing three "deceptively simple" questions, says Stanley: "which children need help, what support they need, and what works to help them".

## New technology

The projects that have been funded use a variety of methods, ranging from randomised, controlled trials of therapy treatments, to analysis of data from an existing longitudinal study. One study is even using brain imaging to look for clues as to how abuse triggers later mental health problems – a sign of how the NSPCC's research activities are changing. "There have been some massive advances in science in recent years," says Stanley, "and if we're not deploying those advances for our children, then we're really missing something. We shouldn't be the poor relations of advances in data science or cognitive sciences."

The charity is also looking into how new technology could allow it to extract more insight from calls to its helplines – without compromising anonymity. "I think we're at a really interesting time in terms of being able to use what we learn from the contacts we have on both our helpline for adults and Childline," says Stanley.

Calls to Childline are never recorded, but the text of emails could be analysed to produce anonymous, aggregated data. The NSPCC is considering how it could use this technology to get a clearer overall picture of subjects, themes and trends, while protecting anonymity.

How the NSPCC handles sensitive personal data for research is overseen by its research ethics committee, made up of independent experts, as well as an information governance committee who deals with broader issues involving data.

The changing legal context is also having an impact on how the NSPCC's research is done. "How we connect with our supporters has changed dramatically in the past couple of years, and will further, because of changes to the legal guidance," says Stanley.

The European Union's new General Data

Protection Regulation (GDPR), set to come into effect in the UK in May 2018, will be "a radical change" because "it requires people to actively want to hear from us. It means it's really important for us to be engaging people in a way that they actively want to engage with us."

Challenges like these make measuring impact hard, Stanley says, "but that doesn't mean we shouldn't do it". In this area, she believes, the charity sector has too often "let the perfect be the enemy of the good". "We say, it's really hard, so we won't do it. We expect people to just trust us. At the NSPCC we've said, that's not enough, this matters too much to leave it to instinct. It's better to attempt and get an imperfect measure of your impact than just to say, we think this works.

"It's difficult to measure social change, it can be quite off-putting and daunting, and it involves quite a lot of time and energy and resource to get it right. We've taken a decision, we think that's an important investment because we want to be confident that we're spending our donors' resources on things that make the most difference. We think we've got a strong story to tell about the difference we can make." ▮

## WHAT HELPS ABUSED CHILDREN?

Four major research projects, funded by the NSPCC and the Economic and Social Research Council (ESCR), are under way to find out how to help children who have experienced abuse get back on track.

**Learning from experience**
The University of Bedfordshire is working directly with young people who have experienced abuse to learn from them about what types of support can help people build their lives after abuse.

**Responding to trauma**
Queen's University Belfast is conducting a randomised control trial of trauma-focused cognitive behavioural therapy, and investigating whether front-line staff can be trained to assess children for post-traumatic stress disorder.

**Understanding resilience**
King's College London is drawing on data from an existing longitudinal study of 2,000 children from birth to age 18, looking at what makes some children more susceptible to health issues than others.

**Spotting vulnerability**
UCL is using brain imaging to understand how abuse – and the ways that children cope with it – affects their vulnerability to mental and physical health issues later in life, and how such problems might be prevented.
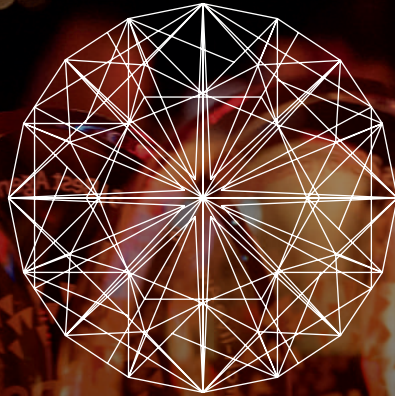
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# Every step along the customer journey

When **Zoe Nicolay** joined Halfords in 2015 as head of customer, just 3% of the retailer's sales could be matched to an identified customer. By focusing on creating a single customer view, Halfords now has a clear understanding of them and their journey. By *Bronwen Morgan*

Z oe Nicolay, head of customer at Halfords, had been with the company for one week when CEO Jill McDonald joined and put her first question to the business: "What do we know about our customers?"

"The answer she got was: 'Not a huge amount'," says Nicolay, who is the first person to hold the customer-focused role at the company.

The paucity of customer insight was a result of previous CEO Matt Davies' focus on transforming the company's operations.

"At that time [during Davies' tenure], Halfords' challenges were more around staff morale, knowledge and training.

"He [Davies] completely transformed that. His focus was on getting the staff in the right place. There wasn't a huge requirement then for thinking about customers, because they

needed to set up the foundation with the staff beforehand.

"So I think it was just at the point that they were recruiting the next CEO that there was this recognition that, actually, now's the time. Now that we've got this great proposition, we can understand our customers better and think about how we can bring them into our shops."

## Customer data

Prior to Nicolay's arrival in the role, a piece of research had revealed that just 3% of Halfords' customer sales could be matched to an identified customer. To address this, in her two years since joining, Nicolay has focused on bringing data together into a single customer view.

"This view looks at in-store data, online data and data across the group," says Nicolay. "That means across retail, Autocentres – Halfords' car service and repairs business – and Cycle Republic, its specialist bike retail business.

"Given that about 12% of our sales are online, we should always have had a 12% match rate. So there was obviously some work to be done to match things up properly."

One measure to address this has been to introduce e-receipts – sales receipts sent to customers over email in lieu of, or as well as, a paper receipt. This was something that Nicolay had seen work well at her previous job at Argos – where she was customer strategy controller – as a "fair value exchange for customers".

"There's a reason for them to give us their details, because in return they'll get that digital receipt," Nicolay says. "It's much less likely to be lost and, because we sell some things on lifetime guarantee, they'll always have that email and we can always find it as well – so that's reassuring for them.

"It's also a really effective way to capture customer data from the 88% of sales going through physical stores."

Halfords can now match 46% of retail sales to customers (59% across the group). Now that it has information on what these customers have bought, if they opt into marketing, they can be sent recommendations for further purchases – whether that's bike accessories or, if they purchased a children's bike, recommendations for bigger bikes a few years down the line.

"I can never say this without sounding quite cheesy, but customers are on a bit of a journey with us," Nicolay says. "What I'm really hoping to do with our data now is that we should be

Customers are literally on a 'journey' with Halfords, says Zoe Nicolay, head of customer

able to see people coming in for the child seat, but then move on to the balance bike, and then to the first bike with stabilisers, and then the junior bike and the adult bike.

"Somewhere in there they might have a roof box, so there is quite a nice little journey through Halfords, of things that we can do, through their life, where we're feeding in products that will be really useful to them at all those different times."

Nicolay says that the joined-up customer view she has championed has also enabled Halfords to encourage more cross-category purchasing. She used her work on customer segmentation at Argos – another retailer that encompasses a broad range of categories – as a frame of reference.

"When we set up the segmentation (at Argos), one of the key things that came out was this, kind of, cross-category idea. If you imagine it as having your least frequent customers at the bottom, and then going up to your really frequent customers, who are probably the most valuable to you, you can see that they would be much more likely to be shopping across lots of different categories.

"What I was working on there – and equally working on at Halfords – was trying to see if a customer starts off in one category, what's the next best category that we could flip them into? You can see from the data of people who are buying two things, what categories are likely to overlap."

## Customer insight

With a steady stream of joined-up customer data to work with, Nicolay's other focus is on using customer insight to understand it better.

"I was really keen when I started to establish a ▸

> **Measuring things that are within the staff's control keeps them engaged with the process**

baseline of the team knowing their research," she says. "I set up some work around brand tracking to help introduce the understanding of what customers think about Halfords compared with our competitors."

Nicolay had a conversation with McDonald – who is now moving on to a role at Marks & Spencer – around what she wanted to get out of the research, and she laid out two key objectives. "She wanted to reinvigorate and improve the store programme of customer experience measures, because she was conscious that it was very skewed; a huge part of it was based on staff giving out cards and asking for customer feedback," says Nicolay.

"That's an issue because it's a very natural reaction to give them to the people who you know are going to give you good feedback."

At the same time, McDonald also said that she wanted an overall business measure to understand customer satisfaction, against which she could measure herself and the rest of the board.

"I remember saying to her: 'That doesn't need to be two separate things. You can bring that together'," Nicolay says.

McDonald was sceptical that the programme for measuring shops and the programme for measuring customer satisfaction could be combined, but Nicolay assured her that if they created an overall end-to-end customer experience programme, they'd get both.

Halfords appointed ABA Research to look after this programme, and launched it in shops last June.

"The bit where it links up to the data is one of the key differentiators, because we now use the email addresses that we're capturing to send an email the day after asking: 'How was your experience?' Nicolay says. "The e-receipts data has massively increased the volumes of people that we're communicating with, and it's also made the feedback less biased."

The e-receipts use a dynamic survey link that automatically connects back to what the individual has bought, populating the questions around what they purchased, where and when. This means that the survey can concentrate on the customers' experience.

Nicolay has also led the charge to move away from using NPS (Net Promoter Score) on an individual store level. While overall NPS is still gathered and can be broken down by category and by individual shops, the shops are never given their score.

"I was keen to keep NPS, because it's a benchmark score, so there's been a lot of work done on linking it to sales," she says. "I was keen that we used it internally, at a broad level and senior stakeholder level. But I felt it wasn't something that shops could necessarily get engaged with."

Instead, stores are given a shop service rating (SSR). This, says Nicolay, is to ensure that staff

are not disheartened by being rated poorly on elements such as value, quality, range and product availability, which are out of their control.

Instead, the SSR is based on elements determined from a drivers analysis that was run for the company by ABA. The drivers that emerged were: 'friendly and helpful', 'knowledge', 'speed and efficiency' and 'colleague availability'. Nicolay says that a similar programme has been launched in the past few months to measure online experience – it was in the drivers analysis phase at the time of the interview.

The drivers are weighted, says Nicolay. 'Friendly and helpful' and 'knowledgeable' had been identified as being slightly more important than the other two, in that they have a greater influence on the overall score. More specifically, a staff member being friendly and helpful will encourage a good experience, while a knowledgeable staff member will be more likely to lead to a purchase.

"Measuring things that are within the staff's control keeps them engaged with the process," says Nicolay. "We know that if they move their SSR up, it will increase their overall NPS, and increase our company NPS. So it's all linked."

All stores receive reports with their scores and in-the-moment alerts are used to ensure that they feel part of a collective move towards increased customer focus. Internal stakeholders ▶

▶ have insight packs that include NPS and SSR scores, as well as insight from brand trackers to look at what's been driving them. A cross-functional customer board (see box) has been created to take a top-down view of opportunities and allow actions to be taken.

"For example, we've seen that the returns process has been a driver of more negative sentiment, so we've done a whole programme of trying to simplify it," says Nicolay. "That's come from the insight – some really actionable things that we can go away and do something about, whereas before, it was more of a carrot and stick approach to stores. Just: 'You're doing well', or 'you're not doing well'."

Nicolay's next step, she says, is to link the transactional data in the single customer view with the research. "For some customers – where they have given us permission – we can identify them, then link it with their transactional behaviour.

"What I'm hoping is that when I look at my most valuable customers, ones that are spending the most, they're likely to have high NPS. That really starts showing the value of giving that great customer experience." ∎



Halfords' Autocentres play a key role in the business

## CUSTOMER BOARD IDENTIFIES OPPORTUNITIES FROM INSIGHT

Halfords has made a move to share responsibility for taking action across the business by creating its customer board, which is formed of senior colleagues from departments including operations, marketing and category teams.

"The idea behind the customer board is that it brings together people from different functions in the business – who are at a high enough level to have some influence, and able to make big decisions – to look at the insights," says Nicolay.

"They look at what's coming out of the customer experience programme, combined with some of the other research that we do, and any other pertinent data that we can get hold of, for example from our contact centre, where we get calls from customers. We then come up with a programme of activity based on the things that are most impacting customers."

The creation of the customer board was supported by ABA Research, which identified and presented key areas of focus that could affect improvements.

Analysis of feedback from more than 250,000 respondents formed the basis of this insight, with satisfaction and NPS examined. A number of different stores are regularly visited as part of the customer experience programme, so learnings from the shop floor can enhance these findings and provide wider context directly from natural conversations with customers.

The customer board has identified six opportunities – each assigned to a key stakeholder who is responsible for devising a detailed action plan.

A recent insight emerging from the board was that Halfords' previous approach had focused only on the elimination of weaknesses, with dashboards using red alerts and grumpy icons.

ABA suggested the board consider the fact that customers use a brand for the things at which it excels in – sometimes taking a hit on its weaknesses in doing so.

It helped Halfords pinpoint defining strengths it could encourage more consumers to experience. Services such as bike build, wiper replacement and car-seat fitting proved the golden bullet – people encountering these have double-digit higher satisfaction scores than other customers.

This shift from mitigating weaknesses to building a strength into a greater strength has made the process more uplifting.

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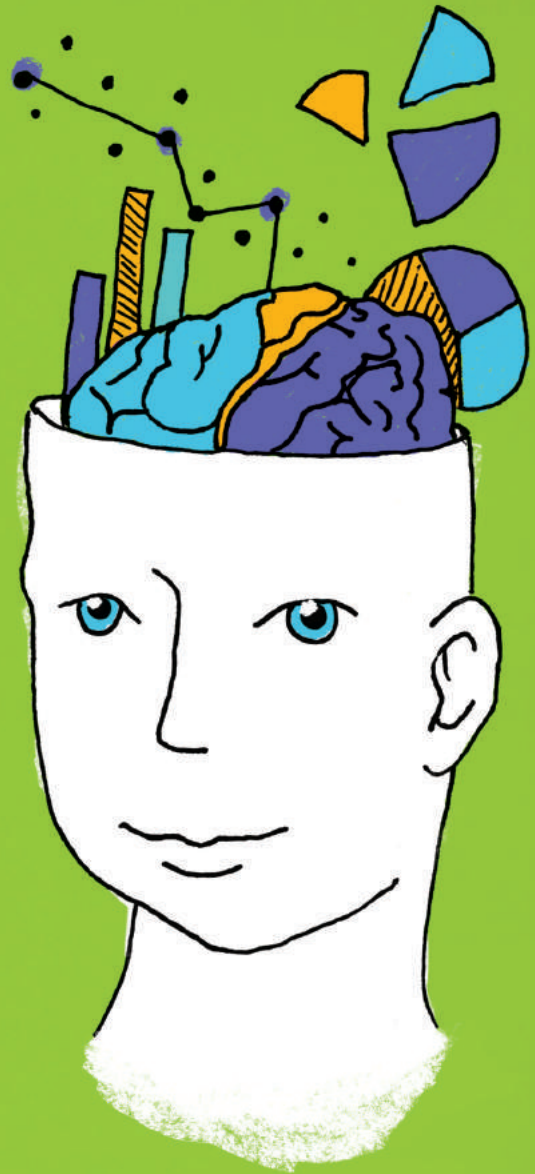
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# FINDING YOUR VOICE

USING AN ALGORITHMIC LINGUISTIC PROGRAMME HAS ALLOWED LINGUABRAND TO ANALYSE CORPORATE COMMUNICATIONS FASTER AND MORE ACCURATELY, WITH SOME SIGNIFICANT RESULTS FOR BRANDS. BY **ROB GRAY**

It takes the average person more than 40 hours to read *War and Peace*. Whereas Bob, apparently, can polish off Tolstoy's epic literary masterpiece in a mere 20 minutes – and he won't skip a word!

Of course, Bob isn't human. He is a 'word geek' robot – a clever piece of proprietary technology developed by brand-voice experts Linguabrand to help make communication more distinctive and persuasive.

"Bob measures emotions and attitudes and persuasion frames in language," says Linguabrand founder Alastair Herbert. "It could be in transcribed research; it can be speeches, brand websites, social media. What is brilliant about him is that he never misses a word, while the best human readers miss at least 15% of the content on first reading."

Herbert spent more than 20 years in marketing before setting up the language-driven research and development consultancy Linguabrand in 2011. In the late 1990s, he was the first marketing director at the newly created FTSE International, and launching its European Indices – market information that was previously given away for free – opened his eyes to the value of data.

Appreciation of the significance of data underpins Linguabrand's approach. Brand-voice development work has traditionally been considered a soft, creative art, rather than a data-led science. However, Herbert argues that Bob's ability to benchmark transcripts or marketing content against millions of other words gives an insightful edge that is helpful for researchers, creative agencies and client companies alike. "Market researchers generally go, 'oh my god, free text. What on earth are we going to do with that?'," says Herbert. "The more people talk, the more problematic it is for them – but the better it is for Bob because, the more people talk, the more they reveal about themselves."

Broadly speaking, Linguabrand measures four aspects of language: clarity, propositions, personality (tone of voice) and persuasion. Let's begin with the first aspect. Unclear, needlessly complex language is, of course, a major barrier to understanding. For a recent project, Linguabrand analysed the websites of 30 US universities. Bob read 150,000 words in around two minutes and rapidly identified that – when it comes to clarity – a fifth of the universities had got it terribly wrong.

"Although they were meant to be targeting undergraduates, when we looked at the reading age, you actually needed to be at postgraduate level to understand the way half a dozen of the universities were talking to you," says Herbert.

Away from academia, Linguabrand has worked with a broad range of clients – including Eurostar, Adidas, Samsung and Breast Cancer Now – and its work has inspired some significant changes.

Herbert doesn't mince his words when pointing out that Eurostar was a "boring" business. Its English, French and Dutch websites were dull, and it struggled to be heard in a competitive landscape of rival operators and budget airlines. Working with brand consultancy The Clearing, Linguabrand measured rivals' websites and all of Eurostar's channel and internal content. The metrics, analysis and "quantified tone-of-voice development" led to the award-winning Stories Are Waiting campaign, which replaced the drab function of 'the journey' with a "sensory destination experience".

Through these changes to its brand voice, Eurostar generated record customer numbers. "We helped turn it from a boring company into owning the emotional relationship between Paris and London," says Herbert.

With Adidas, Linguabrand worked with the senior team to redefine its core persuasive position – to distinguish it more clearly from staunch rival Nike – as well as its propositions and tone of voice. The brief for Samsung focused on customer acquisition in the mobile-phone market; specifically, Samsung wanted to know how to persuade disgruntled Apple customers to switch. Linguabrand ran 32 one-to-one interviews in London and Paris, and people opened up, revealing the deeper persuasion frames associated with their Apple dissatisfaction. The transcripts were fed into Bob, which showed how Samsung should speak differently to women and men.

"We showed Samsung issues people had with its rivals so it could change the language it used," says Herbert. "We gave it questions for in-store salespeople to ask if they discover somebody is ready to switch – then two follow-up questions for females and two for males. The results were extraordinary. Now that it understood the emotional backdrop to issues with an existing provider, it was able to project pictures [using sensory language] back to consumers that worked for it."

Linguabrand has also done a substantial amount of work in the healthcare sector, alongside agencies such as Hall & Partners, and with charities and healthcare providers directly – for example, in understanding and defining disease states.

When two leading breast-cancer charities merged to create Breast Cancer Now, Linguabrand was called upon to help define the new entity's tone of voice.

Bob was set to work analysing blogs written by women with breast cancer. What came through loud and clear was that the authors' thinking tended to be framed around movement and forces; the women needed to 'keep going', wanted appointments to be 'swift' and lamented that their illness slowed them down. It was also evident that they worried about the disease hitting their families hard. These insights changed the way the charity spoke about the disease – it moved away from the 'fight against' terminology used by other leading cancer charities.

Instead of talking about women 'beating cancer', it became about helping to 'find a faster cure' and 'reducing the impact' of the disease. Herbert says this shift in language sat well with women affected by the disease and helped shape the culture of Breast Cancer Now.

Where, then, do organisations go wrong in their use of language? "Businesses love conceptual ideas. They will talk about things such as sustainability, creativity, loyalty, helpfulness. The problem is, that type of language makes the brain work too hard, and it is very difficult to connect to people emotionally."

Sensory language is far more persuasive than conceptual language. The drawback here, however, is that describing one thing in terms of another – projecting pictures, as it were – is much harder for brands to own. Unless, as Herbert would no doubt argue, you put Bob on the job. ∎

# TOGETHERNESS IN A DIVIDED WORLD

WHAT ROLE IS THERE FOR BRANDS WHEN SOCIETY IS FRACTURED AND DIVISIONS WIDENING? HALL & PARTNERS' **VANELLA JACKSON** LOOKS AT WHY KNOWING YOUR AUDIENCE IS MORE VITAL THAN EVER

There is a deeply divisive figure in the White House, controversial wars are being fought abroad, the economy is stuttering, social cohesion is crumbling, and leaders around the world appear to be dangerously out of touch. Yet here is an iconic brand that promises optimism, togetherness and hope. A group of people – photogenic, but still reassuringly real – drawn together, bonded by the values displayed by a recognised label. At least that's the plan.

It worked in 1971. The timeless 'I'd Like to Buy the World a Coke' campaign transformed the advertising and marketing industries because it promised something more than a simple consumerable. Here was a message of solidarity that appealed to a fractured society – an idealistic message of hope that permeated into a multinational, multi-ethnic psyche.

More than 45 years on, and society is almost an exact mirror image – yet, this time, the advertising doesn't resonate as effectively. Inspired by the same youthful 'them v us', 'love not war' sentiment, Pepsi capitalised on progressive inner-city social movements to present itself as a similarly value-driven brand. It was a powerful, meaningful and important message, tarnished in the eyes of many because it featured a reality TV star whose privileged life is far removed from reality. Instead of inclusivity, it hinted at exclusivity.

What's fascinating about these two campaigns is that Coke's 'Hilltop' and Pepsi's 'Protest' stood for unity and cohesion at a time of deep divisions in society. In both cases, the message of the brand is more important than what it actually is – a refreshing soft drink. The message is about togetherness in a divided world.

And that is what brands can do. Unite people by tapping into a collective cultural mood and reflecting a profound human truth – not always improved with the help of celebrities. Today, that ability to inspire is more vital than ever. Societies are fractured, divisions are widening, suspicions of political 'others' are heightened.

In recent years, our industry has agreed that a key responsibility of brands in such an uncertain period is to stand for something far beyond satiating consumer needs and accumulating profits. So we talk a lot about purpose. But do companies really mean it? Are they really living it? Can they demonstrate it; are they connecting with their audiences in an authentic, transparent and meaningful way – or are they just paying lip service to it? More importantly – at least from the viewpoint of market research – do today's

brands know their audiences well enough to craft these socially aware messages? Complacency has, for instance, ruined political careers in the past few years – leaders presume to know their key audiences, but they are using outdated methodologies to try to build robust connections.

The ultra-fast, hyper-linked nature of modern society means humans are less predictable than ever. Simple segmentation is no longer a sufficient measurement. People are being driven not by traditional subsets of differentiators, but by wildly random – yet personal – moments, feelings and experiences. And these moments are being shared, consumed and copied in a social-media instant by hugely disparate audiences.

There is an enormous opportunity for brands to unite us in a way that politicians and the media struggle to do – by reminding us of basic human truths and values, rather than becoming obsessed with laser-focused, narrow over-segmentation. Using social messages and moments that bring people together, that have emotional resonance, a fabulous sense of humour, and a loving recognition of the ordinariness of life.

Sometimes, these messages can have a societal purpose. P&G is currently running a great advert in India for one of its washing powders, Ariel, which encourages men to play a part in the household chores. It's tackling a recognisable issue – in this case, deeply engrained sexist attitudes – and has the hashtag #sharetheload. On other occasions, such messages can be witty gifs that are instantly recognisable and shareable, or emotional touchpoints that relate to our everyday lives. Or they may link us all to an issue and mood that is part of the social zeitgeist. Barclays, for instance, is now talking about technical issues and protection from fraud, rather than simply how wisely our money can be spent and saved.

Meanwhile, Airbnb's phenomenally successful recent campaign focused on freedom, choice, generosity and openness of spirit – everyday values we can all share in; simple cultures that we all want to be a part of. Multiple winners at this year's Cannes Lions festival shared the everyday extraordinariness and emotional connections with which we can all identify. For example, the defiance of *Fearless Girl* (State Street Global Advisors), the joy of sharing sporting moments among impoverished communities (AP Thailand), the simple truth about what clean clothes (Whirlpool) can do to schoolchildren's self-esteem.

What these examples demonstrate is breadth of impact. Precision targeting is useful, but the context in which we're now operating is different. Things are tough and uncertain; our leaders and major companies are no longer infallible and we're not as socially cohesive as we once were. In 1971, Coke bonded disparate cultures with something as simple as a song, a smile, a beautiful backdrop and the promise of happiness. It connected people with simple truths.

Today, that desire to connect is stronger than ever – and the responsibility of brands to forge these connections is greater than ever. We share similar values, our experiences are familiar to each other, our emotions are universal, the everyday events of our lives are still things that can bind us. Championing issues is not the only way to build connections among disparate audiences: owning heart-warming, funny and familiar everyday moments is, too.

When people feel divided and separated, it may be that focusing on the things that we can all relate to – ordinary people doing real things in their lives – may be even more powerful for brands than trying to change the world through a grand gesture.

What's certain is that both strategies need to be built around optimism. The world needs it now as much as it did in 1971. Call me a sentimental softie if you must, but I sometimes yearn for the feelgood, simple moments in life – such as encountering apple trees and honey bees and snow-white turtle doves… ▮

**Vanella Jackson** is CEO at Hall and Partners

# ASK THE RIGHT QUESTIONS...



STARTING A SURVEY WITH AN OPEN-ENDED PROMPT FOR POSITIVE FEEDBACK CAN LEAD TO INCREASED PURCHASE BEHAVIOUR, ACCORDING TO A NEW STUDY. THIS SHOULD RAISE QUESTIONS FOR MARKET RESEARCHERS, SAYS **BRONWEN MORGAN**

We know from the many discussions around referendum wording that the way in which a question is phrased can have a significant impact on the response generated.

This is also true for surveys with more than one question, but – in those instances – another factor can influence the outcome: survey framing. Recent research has revealed that beginning a survey with an open-ended question – specifically one asking for positive feedback – can lead to increased customer purchases among those completing the survey.

Previous research has demonstrated the 'mere-measurement effect', by which simply measuring an individual's purchase intentions changes their subsequent behaviour in the market. This latest study proposes 'mere-measurement plus', whereby starting a survey by asking customers to recall something positive about their purchase experience increases subsequent sales.

The research used two studies to test this hypothesis fully; the first was a longitudinal (12-month) field experiment with customers of a large, US, portrait-studio retail chain. After each interaction, all customers were invited to participate in a survey.

The company's standard feedback survey was modified so that customers were assigned to one of two groups – in one they were given an open-

ended prompt at the start of the survey, asking them what had gone well with their most recent visit; in the other group, customers were asked only closed questions.

Except for the opening question in the first condition, the questionnaires were identical.

Even after accounting for a number of effects – including 'mere measurement', previous product and service quality, past purchases and income – it was found that customers who had been asked the open-ended question at the start of the survey spent 8.25% more than those who were not.

Because of constraints with the first study around assessing the baseline effects of solicitation and some aspects of mere-measurement, a second study was carried out with a manufacturer of business to business (B2B) software that continually tracks customer feedback.

Four customer groups were created: those who weren't sent a survey; those who were sent a survey but didn't respond; customers who completed a survey containing only closed questions; and those who completed a survey that started with a request for positive feedback.

The comparison of the average customer spend across the groups was telling: those who were not sent a survey spent $0.17; those who were sent a survey but chose not to respond spent $1.27; people who completed the survey of closed questions spent $6.66; and customers who completed the survey with the positive-solicitation question spent significantly more on average – $8.85.

"The typical approach to understanding customer attitudes often assumes that customers' perceptions are static once experienced – in soliciting feedback,

researchers simply try to capture the customer's image of that experience," the research authors wrote. "In contrast, our field experiments reveal that customers' perceptions of their experiences are malleable, and that an open-ended, positive-solicitation frame can encourage future customer spending."

## POSITIVE NARRATIVES

The results of the study raise questions around whether market researchers should be wary of using such questions for fear of skewing survey results.

Sterling Bone, one of the authors, agrees that some care should be taken in using this framing approach, but he still believes that researchers should embrace the approach to "understand the basis of customer satisfaction and customer loyalty".

"Capturing the positive narratives in customer experience allows firms to rally their employees, celebrate their successes, and to benchmark customer experience internally," he says.

"As with any measurement, researchers need to recognise that these questions trigger behaviours in respondents and they need to be careful in how they are used, from a practical and ethical perspective.

"We caution researchers to understand the true motives of using open-ended, positive-solicitation questions. If the motive is to reframe entire surveys to focus on positive experiences, a company could misinterpret a manipulated uptick as an actual improvement in service."

But it's not just the potential misinterpretation of results that raises issues, according to Dr Michelle Goddard, director of policy and standards at the Market Research Society (MRS). She says there are also questions around the integrity of the approach, and suggests the "bias by design" that this approach appears to advocate "risks undermining the wealth of robust research undertaken by research practitioners".

"Rules on data collection in the MRS code of conduct seek to ensure that bias in research design and methodology is minimised," says Dr Goddard. "The code specifically requires that data-collection processes must be fit for purpose and that clients are advised accordingly. It also requires that participants not be led towards a particular point of view."

Given that structuring research in this way lends itself to potential contravention of the MRS code, Dr Goddard suggests that – as a minimum – any potential client looking at a project of this type would need to be advised that it is not a research project, but more of a marketing exercise.

## RELATIONSHIP BUILDING

Bone, meanwhile, recommends that companies continue to offer their original surveys to a control group of customers, so that genuine service trends are not obscured.

"If the researcher's motives are to promote positive wellbeing in customers, they can gain comfort from knowing that previous work in psychology points to the salutary effects of expressing gratitude, and suggests that being asked for compliments might increase customers' feeling of wellbeing," he says. "We suggest researchers consider this approach less as a means of manipulating perceptions, than as a way of building relationships."

Sterling A. Bone, Katherine N. Lemon, Clay M. Voorhees, Katie A. Liljenquist, Paul W. Fombelle, Kristen Bell Detienne, and R. Bruce Money (2017) 'Mere Measurement Plus': How Solicitation of Open-ended Positive Feedback Influences Customer Purchase Behaviour. *Journal of Marketing Research*: February 2017, Vol 54, No 1, pp156-170.

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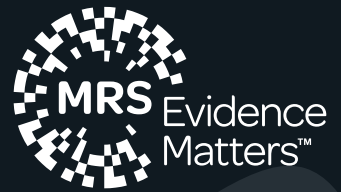
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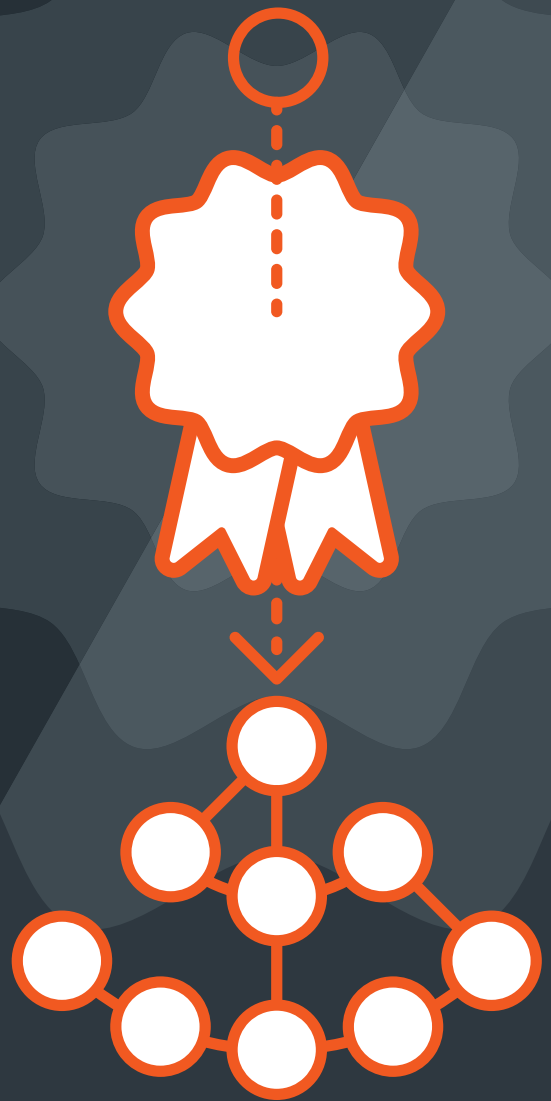
# China's terrific three

In the West, the 'Fearsome Five' – Apple, Amazon, Google, Facebook and Microsoft – dominate market power and thinking to such an extent that it is hard to appreciate that in China, the world's biggest consumer block, the media ecosystem is overwhelmingly dominated by Tencent, Alibaba and Baidu. But how much do we know about these Chinese titans in the West?

Tencent officers media, entertainment, payment systems, internet and mobile phone value-added services and operates online advertising services; it has a market capitalisation of $350bn. It is one of the largest internet companies globally, leads in gaming, and owns mobile chat service WeChat.

Alibaba is China's leading e-commerce player and overtook Walmart to be the world's largest retailer, with gross merchandising volume equal to Amazon and eBay combined. It has a market capitalisation of $360bn.

Baidu, the leading Chinese search engine, has a market capitalisation of $60bn. Of the 'Terrific Three', Baidu, the smallest in market capitalisation terms, appears the most ambitious. Founded in 2000, Baidu spends 16% of its revenues on R&D and was recently rated the second 'smartest company' globally by MIT.

The focus of Baidu's strategy is the shift from mobile to Artificial Intelligence (AI).

Interaction has evolved from a PC with a keyboard and mouse (two hands) to mobile devices with touchscreen displays (one finger) and is now moving to voice controlled/conversations with third-generation devices (no limbs).

Operating systems started with Windows before moving to iOS and Android, and Baidu has recently developed DuerOS AI,

## "The belief is that AI will transform marketing"

which it views as the third generation that will be the future of digital assistants.

The Baidu brain uses a combination of image technology and natural language understanding for voice technology. It has developed a Deep Learning Model (DLM) that ensures that AI has the data, cloud infrastructure and processing power it requires to work effectively. The DLM mimics the brain, never forgets and gets better as it gets more data.

Baidu makes extensive use of Facial Recognition Technology (FRT). At Cannes Lions, Baidu demonstrated how it is fighting Alzheimer's disease – it has developed glasses that detect and recognise faces with 99% accuracy and then projects the name of the individual the wearer is looking at onto their glasses as a prompt. The work received a standing ovation.

Another area of focus was voice recognition, which Google expects half of all search to come from by 2020. Baidu is now 10-15% activated by voice. Baidu is developing a home assistant to rival the Amazon Echo. In a test, Baidu DuerOS AI was asked random questions and could answer 90% of questions and get them right 90% of the time. Accents across China are very different and there are more than 80 dialects. Baidu provided a case study of how it worked with KFC to design a digital assistant that could take orders in different dialects.

Baidu believes that AI will transform marketing – it has the capability to improve the understanding of customers, while enhancing creativity and transmedia storytelling.

It would be remiss of me not to mention Huawei, which is the third-largest handset manufacturer in the world, having started only five years ago. The group has spent $45bn on R&D over this period. A typical millennial in China spends three hours per day on their phones and interacts with it 500 times per day – yes, 500 times compared with an already mind-boggling 100 in the West.

Interestingly, Huawei has a corporate structure that has three joint CEOs who operate on yearly rotation. The company is privately owned by its staff; the founder has a 1% share only. The corporate structure of Huawei decentralises areas of focus to the markets it perceives to have the strongest capability. For example, France is the centre for design and Germany for engineering.

Given the scale of the domestic Chinese market, Huawei is not compelled to expand internationally. A luxury that only the US could boast historically – and we all know where that led in the global leadership race. ∎

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

# HERMANN HAUSER IN SEVEN

AUSTRIAN-BORN **HERMANN HAUSER** IS A COMPUTER PIONEER, TECH ENTREPRENEUR AND VENTURE CAPITALIST. AMONG THE COMPANIES HE'S FOUNDED ARE ACORN COMPUTERS (AND ITS SPIN-OFF ARM), ACTIVE BOOK COMPANY, VIRATA AND NET PRODUCTS. IN 1997, HE CO-FOUNDED AMADEUS CAPITAL PARTNERS. HE IS ALSO A FELLOW OF THE ROYAL SOCIETY

**1 What area of tech do you currently find most exciting?**

Probably the single largest new tool that we have is this machine-learning tool and AI – which cuts across all tech businesses. We've made many investments in that space. Probably the most talent-laden AI company in Britain is Prowler.io here in Cambridge with AI superstar, Carl Rasmussen, its chairman.

**2 What are the three most important things you look for in a business when you decide whether or not to invest in them?**

One: size and growth rate of the market. Unless there's a big market or potential market, it's not worth doing. Two: the quality of the team. I'm looking for at least one star because once you've got one star, especially a global star, you can build the team around them. Three: defensible technology – patents or know-how – if the thing finally works, then people can't just copy.

**3 What is the single most important attribute you need to be an entrepreneur and why?**

Passion. If they are really passionate about what they are doing, then they will learn the business sense and they will be able to survive all the ups and downs and inevitable crises.

**4 You have worked with government on business innovation and skills. How would you rank the UK in this and do politicians understand entrepreneurialism?**

There is a huge difference between the understanding of business and the requirements. Sadly, at the moment, we seem to have a 'loony right' that don't think they need to talk to business. They are dogmatic and just not evidence-based. However, Greg Clarke [Secretary of State for business, energy and industrial strategy] does have a reasonable understanding of what's needed. And maybe Phil Hammond [Chancellor of the Exchequer] too, but they are two adults in the kindergarten.

**5 What do you think of education in the UK around STEM and computing?**

It's bad. Britain is falling behind lots of Asian countries. We have a number of initiatives – the coding initiative, physics in school, we've just introduced the computer curriculum. These are all good initiatives but we need to pull our socks up because other countries are snapping at our heels. The salary level of teachers is certainly an issue and then it's a cultural one. Teachers aren't held in as high esteem as they are in Finland for example. That's why Finland is always among the top nations when it comes to the STEM subjects.

**6 Why didn't you approve of Softbank's purchase of ARM?**

It was very sad that we were losing the last globally relevant technology company in the UK to the Japanese. And there was no reason to sell: we had $1billion in the bank, so there wasn't any cash crisis and we had – and fortunately still have – a management team to die for. Having said that, Softbank, out of all potential acquirers, is probably the best one can hope for – especially with Masa [Masayoshi Son, its CEO]. As long as he still runs Softbank we'll be fine and he's doing what he said he'd do, which is very supportive of Arm, keeping the management team, and building the R&D strategy. And we're hiring 1,000 people in Cambridge at the moment. However, he's retired once already and if he retires again, what will happen to Arm then?

**7 How will Brexit affect the UK tech market?**

Very negatively. It's the most ridiculous thing to happen. The first reason is the freedom of movement. How, in our age, you can try and create barriers where there were none before is totally incomprehensible to me. Eight out of the 12 early stage companies we're supporting here at Amadeus have CEOs that came from outside the UK. And this is true in every country; this is not peculiar to Britain – more than half of the founding CEOs in Silicon Valley are not American born, and the same thing is true on the continent.

The second problem is the freedom of being part of a larger market. There are really only three markets in the world that are worth pursuing: American, Europe and Canada. Britain will find out, sadly the hard way, how difficult it is to be a market of just 60 million people. It is just irrelevant. Once it becomes clear – as it is to anyone with half a brain – that Brexit is clearly going to be very bad economically for Britain, hopefully people will change their minds and we'll have another referendum. ▪

# A SENSE OF DIRECTION

D o you have a good sense of direction? Not just expert compass-reading skills, but an innate sense of which way to head? While some animals use the Earth's magnetic field to determine the right way to go when migrating, for humans, a perfect sense of direction requires an extra tool of some sort.

But what if your body was 'told' every time you pointed north – how would that affect your sense of place and understanding of your environment? Researchers are trying to find out by questioning people who have signed up for Cyborg Nest's North Sense.

The North Sense allows people to sense the electromagnetic field by attaching a small device to their bodies that vibrates whenever they face north. In this way, the device acts as an exo-sense – it sits outside the body, but is permanently attached, like other sense organs.

This human-enhancement technology was designed by Cyborg Nest, which was co-founded by Scott Cohen and Liviu Babitz. Now, Carl Smith, director of the Learning Technology Research Centre and principle research fellow at Greenwich-based digital media and design college Ravensbourne, is leading a qualitative study into the effects of this sensory augmentation.

Babitz says the inspiration behind North Sense was to understand things that had been impossible previously. "Everything we ever created, we created because we have senses. If we have more senses, we are lifting the creation glass ceiling of humanity exponentially higher," he claims.

The decision to develop North Sense was easily made. "We had a list of ideas we were playing with," says Babitz. "We saw that [the sense of north] was part of everything we know. Every tradition has a north in it; there are theories that humans used to have this sense in the past and lost it; there are animals with this sense. It looked like something that is a big part of our

HOW COULD KNOWING WHERE NORTH LIES AFFECT YOUR APPRECIATION OF SPACE AND THE ENVIRONMENT AROUND YOU? RESEARCH INTO PEOPLE WEARING A PIECE OF TECH THAT CONSTANTLY REMINDS THEM WHERE NORTH IS COULD SOON TELL US.
BY **JANE BAINBRIDGE**

existence, although it's not something people speak about. It is there in the background all the time."

The device is connected to the body using two piercings that form an anchoring system. The vibration when you face north is very slight. "You are the same person, with the same life, but there is a piece of knowledge that you have that others do not. Your rhythm and style of life will determine how that piece of information is used. It can start connecting to your memories – how you remember and understand spaces and orientation. Some North Sense owners describe it as the helicopter view; you can always see yourself from above. You're not just walking somewhere – you know where you're walking," explains Babitz.

The device is taken off to charge every day or two, but you can't turn it off. Babitz says the company has sold about 300 devices to a wide range of people. "We have lawyers and accountants, people with tattoos, sailors, artists, tech CEOs; the age range is from 18 to 67."

Smith has about 30 of these people in his qual study, which he thinks can address some fundamental questions about this type of exo-sense. "What does it mean when you become the technology? I'm interested in the neuro ethics of the debate; the philosophy of these augmentations. I'm looking at creating a new science around this: contextology – the science of context engineering."

North Sense, he says, is an objective sense, whereas most senses are subjective. "It makes it an interesting super-sense, as it could affect all the other senses," adds Smith, who explains that his "will be a longitudinal study with interviews, and we're doing a literature review. I want to build a mobile app and to gamify it. The next phase will be functional magnetic resonance imaging (FMRI) to look at the brain and if there are any changes. We're asking people their motivations, expectations, if they have any other implants or body modifications, the reactions from others, and where they put it on their body."

From the effects on the individual to the effects on society, Smith is ambitious for this research. If it turns out that it's dangerous, that will come out too, he says. Regardless, he wants the research to contribute to the knowledge base that can be used on future builds. ∎

# CITY LIFE

A TEAM OF SCIENTISTS HAS DEVELOPED AN ALGORITHM TO INCLUDE SENSORY DATA IN A CITY MAPPING APPLICATION SO PEOPLE CAN CHOOSE A ROUTE THAT MAKES THEM MOST HAPPY. **JANE BAINBRIDGE** REPORTS

Urban living can have its pitfalls – noise, congestion, crowds and big commutes – all resulting in annoyed and exasperated city dwellers. While city mapping has helped with route planning, the focus of these apps is invariably efficiency – getting from A to B in the quickest time possible.

Now scientists have joined forces to rethink this type of mapping, and instead of focusing on time-saving, have considered journeys in terms of pleasure and wellbeing.

Luca Maria Aiello, a social media and computational social scientist at Nokia Bell Labs, is one of them, and has collaborated with Daniele Quercia and Rossano Schifanella to work on their project, goodcitylife.org.

"This work started back in 2014 when the three of us were working at Yahoo Barcelona. Daniele was initially working in the computational urbanism area and Rossano and I were working more in social media mining," explains Aiello. "We wanted to provide some tools that not only maximise efficiency but also maximise the happiness of people walking around the city. It was a natural fusion between our expertise."

By using science to help understand how people perceive their urban environment, they hope to improve that environment. "We can't just focus on the technology without thinking about the people who might benefit. We use computational tools that look at the actual needs of people in their daily lives. Social psychologists and urban scientists say it's mostly about capturing multi-sensory perception of people living in cities so that you can then do interventions to improve things," he explains.

The team has built a number of maps using social media data to track sensorial and emotional aspects to cities – including 'happy maps', 'smelly maps' and 'chatty maps'.

For instance, happy maps have been created using a crowdsourcing platform and geo-tagged pictures. By using a web game, players were asked to choose between two pictures taken in the city and say which made them happier. Based on the selections, the researchers could determine which urban scenes make people happy. The result was a routing algorithm that suggests a path that is the shortest possible while maximising emotional gain. People are literally re-routed to happier streets.

## CONSENSUS WAS EASILY ACHIEVED

Quercia did the initial work with a crowdsourcing platform called urbanopticon, where people could

vote on the beauty of two images. This was the initial training set for the machine-learning algorithm that learns what elements in these pictures are associated with beauty. "You can reuse these algorithms to judge any other picture, with tags attached, on beauty. This methodology can be used in principle to label every single picture in Flickr, Instagram and so on. So you can acquire the scale by looking at social media," explains Aiello.

So would this mapping have even been possible without social media?

"At the time, we were working closely with the people at Flickr because it's a Yahoo property. So we had access to a large number of images and data from the platform," says Aiello. But, he adds, other data sources may have worked. "If you think about Google Street View or other mapping initiatives such as OpenStreetMap, where you have either text or tags or actual images, you could use algorithms that look at the actual image and relate the components of the image to how much the street is quiet or happy. Social media is very rich, but it's not the only source of data for these type of studies."

What's interesting about this data collection is how even though something like beauty or aroma might appear to be highly personal, consensus was easily achieved.

"These are very fuzzy concepts; however, while they may be subjective, they aren't completely random. If you ask 1,000 people to look at pairs of urban landscapes and judge which one is the most beautiful, very often you get a large convergence to one," he says. "If you collect enough crowdsourcing data, you can make sense of what elements, on average, are perceived by the general population as more beautiful. In urban landscapes, the most beautiful are parks and greenery and the ugly things are usually very busy roads and ugly buildings."

Within an urban context, smell and noise are usually considered in a negative light, whereas the researchers were looking for data reflecting a positive presence.

On their 'smelly map', the team collaborated with artist and designer Kate McLean, who has studied smells in the city. She conducts 'smell walks', where groups of people go round the city annotating smells. From this methodology Aiello and his colleagues could gather text smell descriptors. "We matched these tags with geo referenced tags from social media – and did the same thing for sound," adds Aiello.

## MOVING ONTO TOUCH

Although smell could change considerably throughout the day, the maps are not adapted in that way. "If you spray a perfume on your wrist you have an initial smell and then a base note remains. So what we are capturing is the base note of the city. We haven't done any work capturing specific smells occurring transiently."

So far the team has mapped 12 cities – mostly in Europe and the US – as a showcase, but in theory it could be replicated for any city with enough coverage.

So what are the applications? Aiello cites two: using the routing algorithm to augment something like Google maps to give route options to maximise the happiness of your journey; and as a tool for policy-makers and city councillors to make improvements.

"There are very strong associations between type of smell and sound and the emotions that people express in the areas where these smells and sound occur. So you can use the smell-scape and sound-scape to also estimate how well people are feeling in that area.

"Policy-makers could look at these insights to make policy interventions. Of course it's hard to measure how the impact improves people's lives, because this is much longer term, but this would be the vision," he explains.

And the next stage for their research is that missing sense – touch.

"Now we're trying to finish all the sensory spectrum, and soon we'll have something on touch. We're working also on intangible properties such as the perception of ambience in a neighbourhood and we'll have a paper out soon on this.

"The final thing would be to have a description of several different layers and to synthesise all these layers in one very effective descriptor and say this is a good area and this is a bad area and how can we improve the bad area." ∎
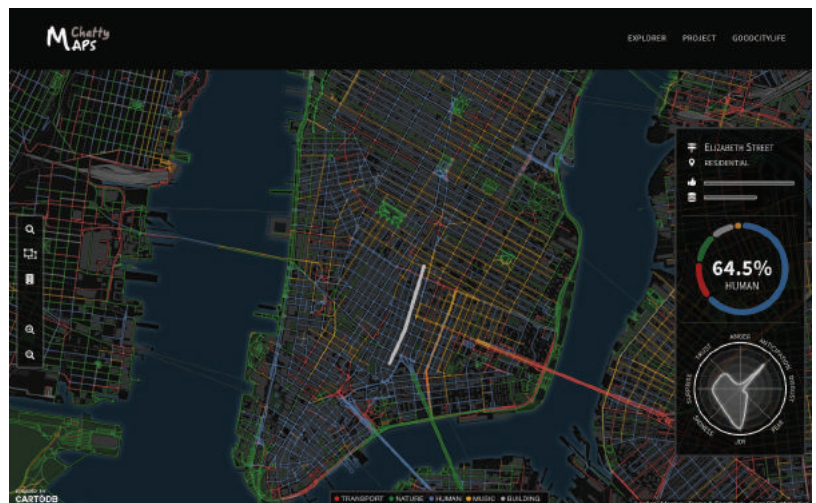


Chatty Maps identifies the sound-scape of individual streets

# View from Silicon Valley

Previously I've written about the pronounced differences that you can find in tech companies between teams specialising in qual, 'traditional' quant and big/behavioural data. This isn't unique to tech but it's certainly more obvious in our industry.

I've written about some of the opportunities for research teams and agencies to complement behavioural data by adding context to what the data is telling us. I have to be honest though – at some point we're all going to have to take the plunge and learn some data science. Simple as that.

If you're running a brand tracker, what happens when your stakeholder completes a predictive model to identify patterns in their data that foreshadow changes in market share in real time? If you're a qual specialist, what happens when your client launches an AI tool that automatically mines social media data and has in-depth discussions with consumers on its own?

These examples are happening right now in the companies I talk to every week, and the implications of work like this will be felt by everyone in our industry.

We don't all need to become data scientists but if we're to continue helping our clients and stakeholders make more informed decisions, then we're going to have to understand that world more than we do right now.

But I'll admit something: I was nervous about starting.

For years we've been excitedly talking about big data but nobody ever seems willing to admit that taking the first step can be daunting. I wanted to share my experience of starting my journey in the hope it might encourage others to do the same.

I'm a quant by training but I've always safely cowered behind the walls of statistics software, SPSS. The idea of learning a programming language was confusing and I had no idea where to even start.

I'll let you into a secret – it's much easier and faster to pick up than you think. And to be clear, I had zero previous experience of writing code.

So don't be worried, just give it a go. Here are the three things I've learned from engineers in San Francisco that you should keep in mind:

## "Don't be shy in asking for help. This is an open source world"

### 1. Focus on one language – I recommend Python

Don't be put off by the dizzying array of possible programming languages. Just start with one. Python is the *lingua franca* of data science and there are a huge number of very accessible – and free – courses you can do online.

### 2. That code you're struggling with has already been written before

Engineers are expected to share their code. Think of it like building with Lego. You don't need to know how the bricks are made, you just need to click them together. Websites such as GitHub and Stack Overflow are full of chunks of code that you are expected to borrow, so don't be shy in asking or searching for help. This is an open source world.

### 3. You'll never need to write models from scratch

Even with something like machine learning, which sounds terrifyingly complicated, the models have all been packaged up for you. You just need an idea of what you're trying to do and then you take a model off the shelf – try it and see what happens.

I hope that knowing you're not alone in being nervous about starting helps, but keep those three things in mind and try that first step. We all need to do it and we're running out of time. Let me know you how get on. ∎

**Matt Taylor** is consumer insight lead at Twitter

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# SHARED BEHAVIOURS

WORD OF MOUTH IS VITAL TO BRANDS, AND SOCIAL MEDIA HAS ADDED ANOTHER DIMENSION TO THE CONVERSATION. BUT OFFLINE AND ONLINE SHARING WORK IN VERY DIFFERENT WAYS. BY **BRONWEN MORGAN**

S ocial media has made the world simultaneously bigger and smaller. Where once an ordinary person only had a limited circle of influence, now – as long as there's an internet  connection – we can all share our reviews and recommendations of brands and products with the world, via Twitter, Instagram and Snapchat, among others.

As a result, these platforms have become popular among marketers and market researchers alike, for providing access to 'authentic' conversations. But there are questions around the extent to which social media conversations reflect real-world ones. Can the two be reliably considered as reflections of one another?

Not according to a recent study in the *Journal of Advertising Research*: 'Why Online Word-of-Mouth Measures Cannot Predict Brand Outcomes Offline'.

The study looked at four metrics – volume, sentiment, sharing and influence – to assess the potential correlations between online and offline conversations about brands. It found almost none.

Brad Fay, chief commercial officer of Engagement Labs, who co-authored the study with his colleague Rick Larkin, vice-president of analytics at the company, explained that the study came about as a result of the company's merger with Keller Fay Group around two years ago.

"We've been tracking the brands people talk about using a survey research methodology. Then when we [Keller Fay] combined with Engagement Labs, the idea was that we would combine social media analytics with total conversation measurement to create something that we call 'total social'.

"Clearly, one of the first questions that we wanted to answer was – how do they compare to each other?"

To answer this question, the researchers began combining offline and online consumer conversation data and online data for 500 US brands across 16 product and service categories.

Offline data for the brands came from the survey method, which asked respondents to record the categories and brands they talked about the day before taking the survey. Data from the whole of 2016 was included.

Online social media data for the same time period came from an online listening service, which used Boolean keyword queries – a type of search that allows keywords to be combined with operators or modifiers such as 'and', 'not', and 'or' to produce more relevant results. This service identified mentions of the 500 brands across Twitter, online blogs and newsgroups.

For the first test, of the volume of mentions, the researchers analysed all 500 brands collectively every month for a year. A relationship was found between online and offline, but not a determinative one. That is, many brands had similar scores in terms of conversation volume, both online and offline, but many had very different ones too.

"There's been so much interest in tracking social media, and behind that there's been a bit of an assumption that it's probably reflective of the broader conversation about brands," says Fay. "While that is true for some brands sometimes, what we found is that, on average, it's not true."

## FEW GENERAL PATTERNS

The report suggested that where conversation is related to market penetration, purchase or consumption frequency, or advertising expenditure, brands might be ranked similarly in terms of conversation volume online and offline.

However, there are factors that can work against such correlations. If a brand is fashionable or innovative, social media users may want to send signals about being in the know; while everyday products that provide value but aren't 'sexy' have a tendency to perform better offline than online.

"We went in thinking we'd probably find some categories where they correlate pretty well and others where they don't," says Fay. "What we found was that there were very few generalisable patterns. It seems to be quite unique for each brand."

What's more, Fay says, when the researchers looked at tracking brands over time, they found that one type of word of mouth (WOM) often goes up while the other goes down.

There are "a long list of reasons" for this, says Fay. "To some degree, it's because different people are doing the talking and they're talking for different reasons. People's response varies to different types of media and marketing. Also, in the social media sphere, whether the brand is deliberately making an effort is a bit more of an influence."

The researchers also looked at correlations in sentiment and found "no meaningful correlation at all", except in a few isolated cases – for example, with brands undergoing crisis situations, where sentiment declined on both sides.

The final two metrics included in the analysis – brand sharing and influence – showed even less correlation between online and offline conversations. Online brand sharing is based on the frequency with which people share branded content via its social pages, while offline brand sharing is the percentage of the brand's conversations that contain a mention of its advertising and marketing. Both are based, to some degree, on the effort made by the marketer.

For that reason, there was some correlation on an overall basis observed during discrete periods. However, on a weekly trend basis throughout 2016, the correlation was 'essentially zero'. The authors concluded that consumer engagement with brands' marketing content works entirely independently online and offline.

Finally, the report found that there was no correlation between online and offline influencers – based on online influencer score – and a slightly negative correlation over time. "It is fair to say that influencer-marketing strategies for brands need to be considered entirely independently from each other", the authors said.

Another study has revealed differences in trust levels across the two forms of WOM. Network Research looked at what channels consumers trust when planning holidays and visits to leisure attractions, and found a lack of trust in digital WOM.

The study, based on a nationally representative survey of 600 UK residents, found that social media scored the lowest of all channels for trust. While 80% said they trusted family and friends for recommendations, 60% trusted TripAdvisor and 40% trusted newspaper articles, just 32% trusted Facebook, 20% trusted Instagram and 19% trusted Twitter.

There was, however, some difference across age groups when it came to seeking advice from these channels. While 23% of all respondents said they would consult Facebook for holiday recommendations, followed by 11% for Twitter and 9% for Instagram, those in the 18-24 age group were more likely to do so: 40% of respondents in this age group said they would consult Facebook, 23% said they would consult Twitter and 28% Instagram. ∎

Fay, B., & Larkin, R. (2017). Why Online Word-of-Mouth Measures Cannot Predict Brand Outcomes Offline. *Journal of Advertising Research*, 57(2), 132-143.

# POWER PLAY

NEW RESEARCH INDICATES
THAT PEOPLE MAY
SUBCONSCIOUSLY ALTER
THEIR BRAND CHOICE
DEPENDING ON THE STATE
OF THEIR RELATIONSHIP.
**BRONWEN MORGAN**
REPORTS

If you've ever felt frustrated by your romantic partner – perhaps they're messier than you, or don't do their fair share of the cooking, driving or washing up – then you may also have felt a small urge to act out against them as a result. You may even have done so without realising it, according to science. New research has revealed an unusual way in which people respond to frustration with their partner: through their choice of brands.

The study, 'Oppositional brand choice: Using brands to respond to relationship frustration', published in the *Journal of Consumer Psychology*, found that individuals who are frustrated with their partner – or have been primed to feel that way – may, when given a choice between two rival brands, choose one for themselves that is in opposition to the one they believe their partner prefers. This is particularly true if the frustrated person is 'low in relationship power'.

Power, within the realms of close relationships, refers to the ability to control relationship outcomes, meaning those with higher power should be more able to achieve their goals and get their preferred outcomes within a relationship.

The researchers, Danielle Brick, of the University of New Hampshire, and Gavan Fitzsimons, of Duke University, explained that, while frustration within the context of close relationships might lead people to want to act out against their partner, they may not want to actually do so, as they don't want to hurt them or their relationship.

## TESTING THE RELATIONSHIP

According to previous research, higher power individuals are more likely to express their own attitudes and opinions, and in the context of this study, they would be more likely to air their frustrations with their partner directly. Lower-power partners are less likely to have control over the outcomes within their relationship, and are less likely to express their emotions and opinions directly.

To test this thoroughly, the researchers carried out three separate studies. In the first, they asked participants to indicate which brands, between pairs of rival brands across different categories – such as Microsoft or Apple and Nike or Adidas – their partner preferred. They were then asked to think and write about one of three topics: a time when their partner had done something that left them frustrated; their partner's physical appearance (a control condition); or a time when their partner did or said something that made them happy.

Participants were then asked to imagine they were making a choice between the same pairs of brands that they had previously been shown, on the basis of which brand they preferred – rather than which one their partner preferred.

Lastly, the participants were asked to complete relationship measures, including a scale that indicated the amount of power they held in their relationship.

Analysis of the results revealed a significant interaction between emotion condition (whether the individual had been primed to feel frustrated, neutral or happy with their partner) and relationship power when it came to oppositional brand choice. "In other words, when individuals are lower in relationship power and feeling frustrated with their partner, they make significantly more
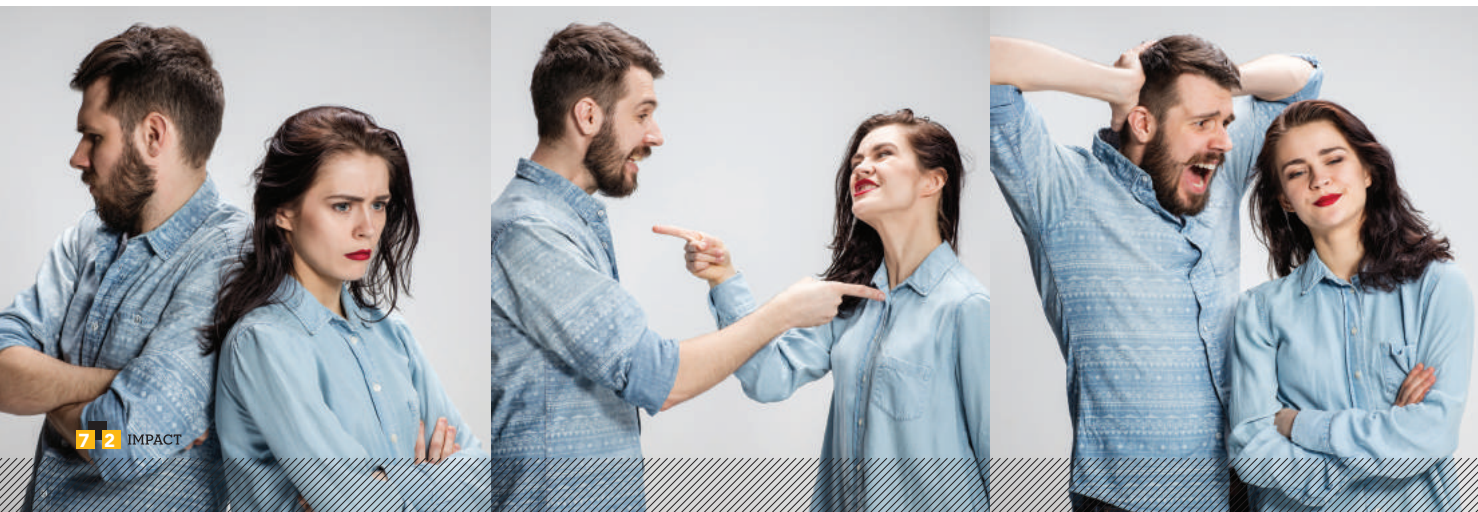
oppositional brand choices than higher-power partners," the researchers said.

Brick is keen to distinguish an oppositional brand choice from a 'spiteful' brand choice. "In the oppositional brand choice, the individual making the decision is consuming/using the brand; in the spiteful brand choice, the individual would be making a brand choice for the partner to consume/use," she says.

This behaviour would also extend to other kinds of relationships, such as close friendships, as long as there is some degree of interdependence, says Brick. "It could also occur in close relationships in which there is a chronic power imbalance, such as parent-child relationships or, potentially, even boss-employee relationships."

A second study investigated whether individuals shift their underlying brand preferences when they make these oppositional brand choices, or make an active choice against their partner. Put more simply, are participants feeling negatively towards their partner's preferred brand as a side effect of their frustration, or are they choosing an opposing brand as an active way of responding to it?

The second study more or less recreated the first one, but, instead of a 'happy' condition, a 'sad' condition was included.

A task was also added in which participants indicated how much they liked each of their partner's brands both before and after carrying out any tasks. In the post-task rating, they also indicated their feelings towards filler brands.

Results showed there was a significant positive effect of power on partner brand attitudes within the sad condition, but no effect of power on partner brand attitudes within the frustrated condition.

This means that those individuals who had less relationship power, and had been primed to feel sad, had more negative attitudes towards their partner's brand, while those who felt frustrated – but who also had low relationship power – did not.

## TAKING CLOSE RELATIONSHIPS INTO ACCOUNT

The researchers interpreted this as support for the idea that there are different effects on brand attitudes and choice depending on the specific negative emotion. In this case, those who felt sad actively changed their attitude towards their partner's preferred brand, while those who felt frustrated chose an opposing brand to their partner's preference, but didn't change their attitude towards it.

A final study used non-conscious priming (flashing the participant's partner's name and emotion – or neutral – words) to activate a significant emotion, in addition to the tasks that were carried out in the first study. This was done to investigate whether subliminally activating close relationships can also influence behaviour.

Results echoed those of the initial study, in that individuals who were non-consciously made to feel frustrated with their partner made more oppositional brand choices as the level of power in the relationship decreased.

Brick believes that the research underlines the importance of taking close relationships into account when looking at consumer behaviour.

"Close relationships are one of the strongest and most influential types of social situations, which suggests that market researchers should take notice of close relationships – for example, marital/relationship status – when evaluating brand preferences," she says.

"One might be able to think back over the course of various relationships and note how changes shifted over the course of the relationship. Maybe when you enter into a new relationship you are a Colgate person, but over time you find yourself becoming a Crest person. But maybe one day that relationship ends. "Do you go back to Colgate or stick with Crest?" ∎

# GENDER BIAS UNDER THE MICROSCOPE

A STUDY INTO UNCONSCIOUS GENDER BIAS HAS FOUND BIAS CAN BE AT PLAY IN UNEXPECTED AREAS. **PAUL BARROW** FROM BLINC SHARES THE INSIGHT

I want to start with some interesting facts about the height of CEOs in America: the average American male is 5ft 9in; in the US population as a whole, about 14.5% of all men are six foot or over; yet among the CEOs of Fortune 500 companies it turns out that 58% are six foot or taller.

We haven't even got to the gender bias element yet but I am sure you will agree that it seems unlikely that when the post of CEO becomes vacant in a large corporation a message is put out suggesting only tall men need apply. Indeed, it seems relatively unlikely that those choosing the next CEO would consider height a relevant factor in the final choice at all.

However, there is clearly an unconscious bias or unconscious prejudice at play that leads those choosing CEOs to prefer tall candidates. The recent debate within the BBC about whether institutional gender bias exists may be explicit gender bias or it may be implicit (unconscious) or possibly both.

The role of unconscious prejudice or unconscious bias in decision-making is increasingly seen as dictating our final choices in everything from choosing one brand over another to finding a partner. Recent academic work shows that our unconscious bias has a more profound and longer lasting impact on decision-making than our conscious bias (though they can, of course, reinforce each other too).

So when Dads4Daughters – a new organisation aimed at raising awareness of gender bias in the workplace – came to Blinc for help, we undertook what is probably the biggest test on unconscious gender bias ever carried out in the UK.

Our test was taken by nearly 8,000 respondents from all walks of life, from factory workers to chief executives, men and women, young and old.

We used our Implicit Association Test or IAT – of which the Harvard IAT and Affective Priming test are the two most famous – developed with our partners Split Second Research to assess unconscious gender bias in a series of different contexts. This is the same test used in academia in the area of racial prejudice to show that even the most liberal minded of us are, in fact, unconsciously a little bit more racist than we would like to think. People tend to show a same-race preference, so white test-takers show a preference for white people, and black test-takers show a preference for black people.

Gender bias is defined for the purposes of this study as: adherence to traditional views of gender roles, especially in terms of working life; a non-conscious belief that certain professions, career routes, personal traits, and roles in the workplace are associated with men and certain others are associated with women.

In the gender bias test, we use around 25 attributes – or primes – words that might traditionally or stereotypically be seen as male or female, particularly in the workplace. The 'targets' in the test are male and female and respondents will need to categorise words as being either clearly male or female – such as girl, boy, man, woman, his, hers – after being exposed to the primes in random sequence.

The degree to which a prime is unconsciously perceived as incongruent with the following male/female target task is the degree to which the task will be slowed down (compared to timing benchmarks taken pre-test). This is all measured in milliseconds.

## SO WHAT DID WE LEARN?

Perhaps the least surprising results were that the more skilled professions, technical subjects, managerial positions and leadership skills are still particularly associated with men at a non-conscious level.

There is also noticeable dissonance between what a lot of people 'think' they feel/think and what they actually

think deep down (at the non-conscious level). Many appear to believe they hold more liberal views than they really do.

Interestingly, associations with females are stronger overall than associations with males. In other words, stereotypes may apply more to women than to men, which raises the question of whether in society we place more constraints on what we expect from women than what we expect from men.

We divided the contexts in which we assessed the possible gender bias into four key areas: professions; career fields; roles in the wider community; and personal qualities. It was clear that professions (such as surgeon, teaching assistant, and so on) and career fields (for example, subjects chosen at college) are far more prone to gender stereotyping than roles (such as leader, follower) or personal qualities (for example, intelligent, gossip).

We also looked at the difference between men and women test-takers in their degrees and areas of gender bias. While there is a high consistency between men and women in their biases (correlation= 0.93), there are also clear differences.

Men will tend to subscribe to the female teaching assistant stereotype more than women. Women are more likely than men to stereotype airline pilots as male – as well as politicians – but men are more likely than women to stereotype the manager as male.

Subconsciously, women tend to believe they are more decisive than men, arguably breaking with the stereotype men have of women on this matter. An intriguing feature of the data is that women show unconscious bias as strongly as men do, and sometimes even more strongly than men do (see diagram, especially surgeon, art, fashion, and gossip).

We can also see that, in general, gender bias tends to increase with age or, to put a more positive spin on it, the youngest groups tend to show the least gender bias.

And what about the effect of having children – both sons and daughters?
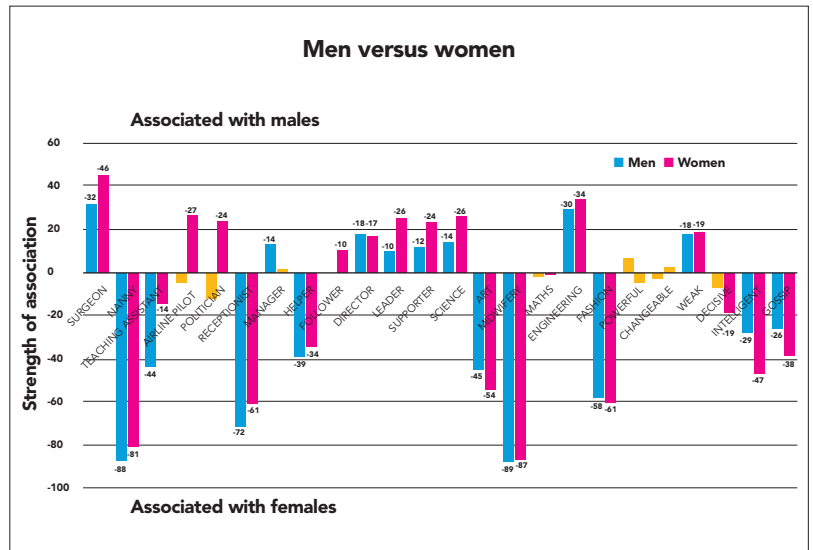


First, we should note that the gender of one's children does not strongly predict subconscious attitudes.

The only finding here was that those who have only sons show the strongest gender bias in professions but they also tend to think that women have more positive personal qualities. Parents who only have boys adhere to the unconscious gender bias more so than if parents have at least one girl. So, the influence of having a girl is to reduce the impact of unconscious gender bias. Also, only having boys may make parents feel – unconsciously – that girls have more appealing personal qualities!

If we look at different job sectors, then we can see that construction, transport, and finance have the strongest gender bias overall, and this may not be surprising as these fields are visibly male dominated. If we look at what we have termed 'roles' (for example, leader, follower, and so on) we see that law has the strongest bias in this area.

There are sectors of work where there is noticeably low gender bias, such as hospitality, public administration and manufacturing, probably because there is a higher ratio of women working in these sectors.

So, the unconscious stereotyping of what is a male or female role in society is still very strong. According to our research, this prejudice or bias is more noticeable in the world of work, and is much less prevalent in wider society roles and almost absent in personal qualities.

Perhaps most surprising of all is the fact that women are just as guilty as men in adhering – albeit unconsciously – to gender stereotypes.

Where does that leave us and what should we do?

Younger adults show much less gender bias, so the future looks likely to become even less prejudiced. However, it may be that as experience at work increases, the more one absorbs dominant themes in the workplace, such as gender bias and, if so, we should actively seek to eliminate or reduce such effects.

There may even be an argument for positive discrimination hidden beneath these findings – because if women are actually just as gender-biased as men, they may need artificially to create or demand equality to effect further change. They may need to 'get over themselves' to arrive in a truly gender-equal utopia, though to be less gender-biased about it, men need to get over themselves too on this issue. ∎

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# MAKING PROGRESS

WHILE SERENDIPITY CAN HAVE A ROLE TO PLAY IN ANYONE'S WORKING LIFE, WELL THOUGHT-OUT CAREER MANAGEMENT IS CRUCIAL FOR IT TO BE FULFILLING. **SINEAD HASSON** SPEAKS TO MARKET RESEARCHERS TO SEE HOW THEY HAVE GONE ABOUT PLANNING THEIR EMPLOYMENT

According to Wikipedia, career management is the combination of structured planning and the active management choice of one's own professional career. The outcome of successful career management should include personal fulfilment, work/life balance, goal achievement and financial security.

So, it would seem logical that something which would provide fulfilment, a sense of achievement and financial security would have priority in our lives. The reality is, it is rare – we are more likely to hire a financial advisor, a therapist or a personal trainer, than we are to create strong relationships with people who can guide our career.

When asked, many research and insight professionals say they fell into their career – often on the way to marketing or advertising – and it is most often a happy accident they go on to forge strong careers in research. This is less evident in people who are at the 10-year level in their career because during this time, research has gained a higher profile and better promotion as a career.

There are moments in your career when it may stall, head in another direction or fail completely. These can be addressed with forward planning and some strategic thinking about: what you want to achieve; who you want to be; where you want to be in the future; what skills you need to achieve that; and who do you need to connect with to achieve these goals?

Your employer has a role to play here and a good employer will have a strategy for development. Large companies will have a learning and development department but smaller firms can still contribute by having a learning culture. Many organisations will provide a mentor scheme that allows for impactful and beneficial training 'on the job' – however, it is helpful if this is supplemented by external training when appropriate.

We asked some people what their experience of 'career management' was and the opinion widely varied.

One said: "I'm not sure my career was managed – I do remember not having an appraisal for five years at one point." The appraisal and review systems are great for looking at that bigger picture. Another respondent added the "formal training and MRS Certificate were a useful grounding".

Encouraging staff to manage careers proactively will ensure greater engagement and likely lead to higher retention. If you do lose people, their experience will have been positive and they will continue to be your brand ambassador – employee engagement continuing beyond employment.

Pam Armstrong, managing director at Opinion Leader, feels "you have to take responsibility and ownership of your career and work out what your broad goals are and what – and who – you need to achieve them".

Finding a mentor helps and that can be someone within or outside the business you work in (see the article, 'Advice from above' on MRS's mentoring scheme in July 2017 *Impact*).

The concept of a 'job for life' has, to all intents and purposes, had its time – people now both need, and want, more flexibility in their careers. In fact, more than 10 years in a company can be seen as a handicap – an indication of a lack of progress – so assume that you will need to move.

The decision to move can be prompted by a call from a recruiter, an advert, a bad day at the office. But rather than making a knee-jerk move, it is in these moments when you need to reflect on the bigger picture.

Nick Bonney, managing director of ABA Research, who has recently moved from client-side research, says: "Don't rush at the first opportunity – be clear about what you want from your career and evaluate all your options, including your current role."

Abi Moorcock, associate director at The Irrational Agency, points to the working environment being a key factor in career choices. "I'm a big believer in personal authenticity at work," she says. The right environment goes a long way to finding success – that can be size of agency, sector, methodology, and so on.

Armstrong adds: "After many years working in a large agency I was keen to work in a smaller one and experience a different environment." And Bonney also says, for him, once the learning and development stops it is usually time to think about the next move.

For all these market researchers, there was something specific to be achieved in a move – a goal set and then attained. This lends itself well to successful career management.

‣ Careers can change direction after something as simple as a chance meeting. For me, a conversation with a recruiter made me think this could be fun (it is!). It's important to be open. Of the people we spoke to, the sentiment is the same – grab opportunities with both hands and, as Armstrong says, "be mindful that sometimes the left-field opportunity might be right even if it's unexpected". So make a plan but don't be afraid to deviate.

Moorcock found that a previous line manager gave her the confidence to go in her own direction to achieve real satisfaction; for Armstrong it was a move to senior management and a promotion to the management board. Both of these represent learning and development that can be directly formative for your future career.

Bonney – who has moved from agency to client and then back again – found that in one role "being the only research person in a team of planners and lawyers meant that I had to change completely how I framed/presented things". That experience had an impact on the way he has worked ever since.

So what advice can we offer those who are thinking about managing their career? "Don't formulate fixed plans at the start; try not to get caught in a specific role; acquire a broad skill base; and keep an open mind," says Armstrong. This tallies with what we see every day – being open-minded will, without doubt, open more doors.

These days of technology and machine learning, Bonney's advice is particularly pertinent: "Focus on honing skills that will be harder to automate i.e. storytelling, commercial acumen and strategic awareness." ∎

## THE JOB MARKET
## THE MANAGERS

People don't usually leave companies or jobs, they leave people. Time and time again, when we ask our candidates why they want to move they will cite their manager.

'They never listen', 'I don't know what he/she wants', 'There is no room to progress, and no-one to promote me', 'He/she just doesn't like me'.

This doesn't mean that these people, 'The Managers', are horrible people – they provide value to their employers, it's just that they are in the wrong job.

There is a strange status thing with managing people. People with three or more years' experience start to collect them like badges. 'I manage three people', 'I manage seven people'. To be honest in the early part of my career, my dad could only equate my success with the size of my team.

In today's complex world, not everyone can manage people – it is a skill that requires a particular set of attributes, some of which can be learnt and some that just come as part of your DNA. In the previous issue of *Impact*, Michael Brown shared his story, highlighting the problem of stress in the workplace. Someone with three years' experience couldn't possibly handle that situation, and these are the real-life situations that managers deal with daily.

So, my advice, if you are starting your career, don't count managing people as a measure of success. Build your skills, knowledge, confidence and, if you are destined to manage people, you will. Respect your seniors and, if they think you aren't ready – trust them.

> " The better your management team, the stronger your output to clients will be, and the happier your staff will be... resulting in lower staff turnover, high employee engagement and a perfect world "

If you are hiring someone to be a manager, take references from previous reports if you can. Invest time in the interview process to test this skill and ask your recruiter to test this skill in candidates they meet for you.

If you are training someone to be a manager, don't focus on the traditional training methods. Use leadership coaching, and if they don't have what it takes, don't make them a manager. There are a huge range of technical training courses that are readily available. We have seen evidence a coaching style training approach yields great results.

And training must continue, particularly for new managers. They will encounter new situations all the time so will need a mentor or regular support from HR as they learn. Set up an internal group of managers, let them share successes and failures and learn from each other.

Also, if you are a business owner be realistic about how much time out of a week your manager needs to spend on 'managing people'. It may be that they don't have as much time for project management. You don't want to sacrifice the people so look at how you are running your teams. Can you move things around to create more space for management?

The better your management team, the stronger your output to clients will be, and the happier your staff will be...resulting in lower staff turnover, high employee engagement and a perfect world.

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

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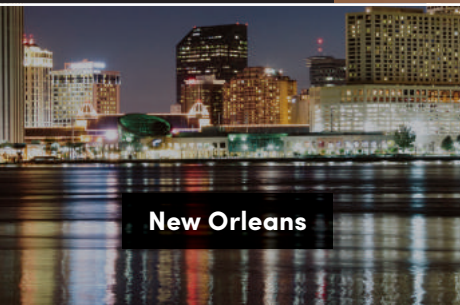
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# REINFORCING RESEARCH ETHICS IN THE DIGITAL AGE

THE MRS IS REVIEWING ITS CODE OF CONDUCT TO ENSURE IT'S UP TO DATE WITH THE RAPIDLY CHANGING DATA COLLECTION ENVIRONMENT. BY **DR MICHELLE GODDARD**

Research ethics underpin the profession, ensuring that care is always taken to protect individual participants and prevent harm as well as manage any risks, preserve their confidentiality and respect the process of informed consent. These objectives remain as compelling and valid today as they always have, but research ethics in a digital age raise a multiplicity of issues that challenge these objectives in both obvious and nuanced ways.

## REVIEWING THE MRS CODE

Greater volumes of personal data are being collected and processed in ever more innovative ways. Growth is exponential, with more data created in the past two years than in the entire previous history of the human race.

Researchers operating in this data-rich environment are often helped by technology such as wearable devices, connected devices, location-tracking sensors and artificial intelligence (AI) and by algorithms that analyse the vast amounts of data. All this is used to create and deliver richer, deeper insights. In this digital, data-intensive environment, researchers need to keep reviewing the underlying ethical approaches in a way that re-affirms individual rights while ensuring innovative and beneficial use of this exciting technology.

Against this background, MRS is reviewing the Code of Conduct, first adopted on 5 November 1954, and last revised in September 2014, to ensure that it is both compliant with the new legislative requirements (in the General Data Protection Regulation (GDPR) and proposed ePrivacy Regulation) and helps to navigate the often messy reality of data analytics of big data sets.

## ETHICAL RESEARCH DESIGN

Ethical considerations need to be embedded in all research projects as part of the project management process and considered at all stages and for all approaches including at sampling and recruitment, generating primary data or collecting secondary data and in reporting results.

Operating with greater internal accountability using both internal ethics reviews and privacy impact assessments will ensure that research projects are privacy-centric with a robust ethical grounding. Reviews will need to consider, document and implement a range of issues and solutions such as:

- What is the need for collection of the personal datasets? The exact purpose? Is the data collection proportionate? What is the period of storage?
- Are there sufficient and adequate safeguards to protect the individual's rights?
- What technical and security measures are in place to ensure confidentiality of the data and effective anonymisation?
- What privacy risks or other risks have been identified?
- Have solutions to either prevent or reduce the risks, or mitigate likely harm been identified?

An emerging risk in today's environment is that re-identification can more easily occur through data links, raising the spectre of breaching anonymity and confidentiality and risking harming participants.

## ROLE OF INFORMED CONSENT

Another core issue is the approach to informed consent, which is both a legal and ethical requirement. Although consent has always been – and must remain – the core default position for research projects, it is time for an honest but careful discussion about what informed consent means in a digital age.

Recent guidance from data protection regulators including the Information Commissioners' Office (ICO) stress that there is no hierarchy of legal grounds when collecting data. Consent is only one of many legal grounds. What is important is that consent is only used when it is truly appropriate and offers individuals genuine choice and control. Ensuring full, informed consent can often be difficult – especially where personal data is not being collected directly from the participants. The challenge is to devise innovative techniques of gaining consent for research projects and to understand its limits:

- Do participants have a very clear and unambiguous understanding of the purpose(s) for collecting the data and how it will be used?
- Is the information appropriately tailored for the audience and the research platform?
- Are there circumstances in which consent is not appropriate or cannot be obtained without disproportionate effort?

The approach to these issues will need to be discussed as part of the ongoing review of Code provisions.

## FUTURE-ORIENTATED CODE

MRS has always been fully committed to enabling accredited members and organisations to engage in their business activities while keeping within the law and the ethics of the industry. It is vital that in this digitally focused world, self-regulatory and trust frameworks such as the Code of Conduct and the MRS Fair Data Scheme, continue to ensure that organisations take their obligations seriously and use data in a transparent manner.

Research can only be conducted with the trust and engagement of participants, and the lawful and responsible use of participant data in the light of emerging technology is more important now than ever.

This core commitment to ethics cannot, and will not, change in any revision of the Code. The challenge will be to ensure that it continues to support all those engaged in market research in maintaining professional standards while reassuring the public that research continues to be carried out in a professional and ethical manner. ∎

**Dr Michelle Goddard** is director of policy and standards at the MRS

# Innovation, inspiration, integration

Next March, our annual conference Impact 2018 will focus on these three key drivers of success. In this increasingly uncertain macro-economic climate, no-one will argue that the first two words are critical, not just to the success of an organisation, but also to its commercial survival.

Effective integration, however, is the key to unlocking the promise of innovation and inspiration. It can be integration of understanding and insight – frequently shorthanded as 'the single customer view'. Just as importantly, it can be that holy grail that enables a CMI team to bring together the thousands of data and insight sources that promise so much but whose competitive potential fails to deliver because of audience fragmentation, as well as organisational ownership.

We know from our own research that a significant number of clients are still not putting their data resources to good use, and the difficulty of integration is a major barrier.

The need to 'clean our data house' - driven by the demands of GDPR - could also be an opportunity to re-examine the way insight sources are integrated and deployed. GDPR is certainly a major incentive to getting rid of data that isn't helping decision-making or insight generation.

As with GDPR, integration is not something that should be left to the IT department. As researchers, just as with procurement, we need to shape the future rather than react to it. We have that opportunity now.

See you at Impact 2018 – if not before.

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



# MY SOCIETY



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## Prediction and planning report

Examining the approaches that produce the most meaningful predictions and how these can be translated into action, this new report from the MRS Delphi Group offers practical guidance on how organisations can avoid the most common pitfalls of planning for the future.

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# Calendar

## Member events

**October**
**16-20** – MRBA Week

**November**
**6** – IJMR Lecture, London
**15** – Consumer Moods Conference, Leeds
**16** – Storytelling for Insight, Cardiff

**December**
**4** – Awards Dinner

## Training highlights

**October**
**24** – Presenting with impact
Aimed at leaders; discover how to supercharge your message and delivery.

**November**
**6** – Data privacy in research
Understand how GDPR will affect market research.

**17** – Segmentation masterclass
Using cluster analysis and more advanced options.

**28** – Behavioural economics
A practical introduction to understanding consumer behaviour.

**December**
**1** – Effective depth interviewing
Learn the skills for a wide range of qualitative research situations.

## Conferences

**November**
**2** – MRS Customer Insight Summit 2017
**16** – Financial Services Research 2017
**23** – Methodology in Context 2017

**Find out more at mrs.org.uk/events**

# Where next?

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

## RESEARCH-LIVE.COM



**Machines may do the learning but people do the teaching**
Machine-learning means market researchers can quickly analyse data from multiple sources, but the core of market research – the 'why?' – will remain human, says Patricio Pagani from Infotools.
www.research-live.com/machineslearn

**Why complex modelling is rubbish**
Our analytics blogger, Ryan Howard from Simpson Carpenter, argues that simpler models are better where insight is concerned.
www.research-live.com/complexmodels

**Learning from Dr Smelser**
People are increasingly uncomfortable with the 'interrogatory' environment of viewing facilities, says Discuss.io's co-founder and vice-president of research solutions Jim Longo, but new tech can help recapture the art of conversation.
www.research-live.com/drsmelser

**Research for passion, not profit**
Interesting projects can still be possible with minimal budgets – it's about being clever with resources says Northstar's research director Jack Miles.
www.research-live.com/passionnotprofit

## IJMR

**Dual roles of consumers**
Myriam Ertz, Agnès Lecompte and Fabien Durif look at the consistency of the consumer motivational process in collaborative consumption.
www.mrs.org.uk/collaborative

**Ideal length for web surveys**
Melanie Revilla and Carlos Ochoa ask respondents the question: 'How long can/should a survey be?'
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