impact

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Future in flux

The future could turn our social and commercial horizons

upside down, but foresight is making sense of a changing world

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Building value

A utumn. I always see it as a season of renewal. While it may not seem so – leaves are falling, the nights are drawing in and we start digging out our comfy socks – there's that back-to-school excitement and a sense of a fresh start before the last dash towards the end of the year.

With that in mind, why wait until January to think ahead? The past few years have shown us that planning for the future is more important than ever – it's perhaps why so many businesses are setting up their own foresight teams. Foresight is the focus of our seven-page *Impact* report this issue (p22). It delves into how organisations including Lego, the British Heart Foundation and E.ON are planning for various eventualities, and how the insight sector is employing strategies to help clients in this area.

While the road ahead may be unpredictable, the report looks at how to map out future directions using input from research with customers and the public. Contributors stress this is about practical recommendations for various alternative possible futures, not making trendy, buzzwordy predictions. But one structural issue that can hold back future planning is that with no particular team owning it, the work can fall through the cracks.
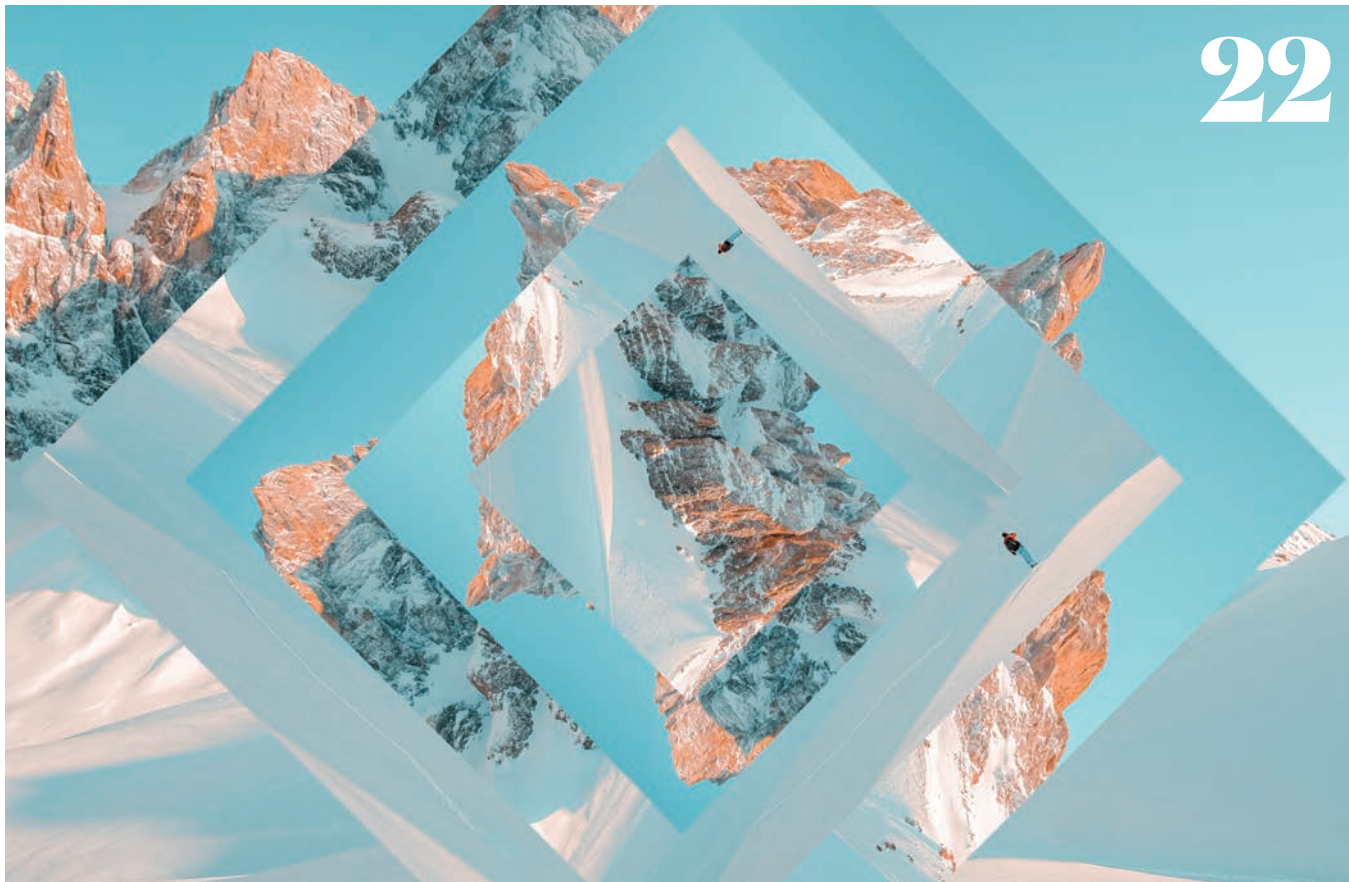
The future isn't fixed, either. As Reddit's head of global foresight Matt Klein tells us, organisations can also influence what comes next and can create culture as much as study it.

Martin Talbot, chief executive of the Official Charts Company, isn't resting on the organisation's historical laurels in an era of music market fragmentation, streaming and AI. He sits down with Liam Kay-McClean (p18) to talk about what the business is doing to add influence and stay ahead – including new research on the role of the charts for algorithm-averse music fans – in this issue's Profile interview.

There can be a gold rush, as we've seen with generative AI, to develop things quickly. As our In Seven interviewee this issue, the Alan Turing Institute's Mhairi Aitken, highlights in the context of AI: "For businesses, the big challenge is resisting FOMO, stepping back from faster and faster innovation and instead, adopting slower, more considered and responsible approaches focused on creating value."

The key to more considered, valuable approaches lies in getting people involved from the outset. It got me thinking about how the research industry is perfectly poised to lead on areas that risk falling through the cracks.

So, after you've got yourself a coffee and sat down to read this issue, we'd love to hear about how you are using insight to address unmet needs or balance innovation and sustainability, or help different teams work more cohesively. Are there areas where you could generate more value (not just growth), within your own business or in client work? We want to hear from you, so get in touch: **katie.mcquater@mrs.org.uk**.

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Don't overlook the basics

I recently spoke to Dr Stephan Vogel, the creative director of Ogilvy in Europe. Stephan is German. He is also a genius, as evidenced by his authorship of a wonderful campaign promoting Deutsche Bahn, the company that runs the German railways. The creative team used artificial intelligence to find photographs of places in Germany that visually resembled more exotic foreign destinations and then, using behavioural economics reframing, juxtaposed live rail ticket prices to the German attraction alongside the (vastly higher) airfare to reach the more distant, but equally attractive, national attraction.

One question I had for Stephan was this: why was Germany such a bit-player in the global tourism market? I've always regarded German tourism as a missed opportunity, a dog that doesn't bark in the night. It is a glorious country with reasonable prices, marvellous infrastructure, fabulous landscapes and historic towns and cities rich in culture and architecture. The climate's not bad and the locals largely speak English. Why would it seem totally normal to say we're going to Florence for the weekend, but not Freiburg, Mainz or Cologne? Stephan's explanation was simple. The Federal Republic of Germany is exactly that: federal. The budgets for tourism are held at the level of the individual *länder*. Since most non-Germans don't know where or what Nordrhein Westfalen or Schleswig-Holstein are, the branding doesn't really work, so Germany doesn't really advertise its many attractions overseas. It would make much more sense to pool the money and advertise the country. We wondered if we could suggest that the German government did exactly that.

I tell this story to illustrate something very simple. Quite often, the reason we don't do something is really quite silly. If you don't have a department for something, or if the budgets aren't in the right place, nothing happens. Whole valuable fields of valuable business activity are neglected for this reason.

Former marketing professor Mark Ritson has pointed to two woefully neglected activities in the field of brand-building: namely sonic branding and brand partnerships. I don't think it is a coincidence that these are two activities that don't really have budgets or departments specifically charged with pursuing them.

To Mark's pair I propose to add a third – something I didn't even have a name for a few weeks ago. When reading a piece by the brilliant business writer Roger L Martin, I discovered that more than 20 years ago Procter & Gamble had appointed someone as head of 'commercial innovation', which the company ingeniously defined as any innovative activity that doesn't change the product itself, but seeks to improve and explore new ways for consumers to engage with, use or pay for it. It is distinct from R&D, which seeks to invent new products or materially enhance existing ones.

Mainstream economics tends to discount the importance of product innovation because it treats everything as a commodity, and assumes there's a straightforward value exchange between volume and price. In the real world, this isn't true.

I can think of many billion-dollar ideas that have emerged through a clever piece of commercial innovation: the Starbucks stored value card, Amazon Prime and the Nespresso subscription programme are just three examples.

> **"How you charge can make more difference to your business than how much you charge"**

How you charge can make more difference to your business than how much you charge. If we were billed annually for our Starbucks consumption, we'd probably all stop drinking coffee! I would further argue that the introduction of London's ultra-low emission zone (Ulez) would have aroused far less hostility had there been a more nuanced approach to charging, and that the recovery of Britain's railways after Covid-19 will also depend on coming up with better ideas for pricing. The season ticket is a nineteenth century anachronism.

Maybe the success of your product isn't being hampered by what it is – that's the province of R&D – but by lack of commercial innovation, which is the province of, well, kind of nobody. It's sort of a marketing question, and an economic question, and an operational and technological question. As a result, I think, responsibility for it falls between five different stools, meaning that everyone ignores it. Consequently almost any business, including my own, could benefit greatly from experimenting with different ways of selling what they do. As with the German tourist industry, structural and bureaucratic factors have simply led to something very, very important becoming woefully overlooked. If we want to grow the economy, and you want to grow your business, this may well be the first place to look.

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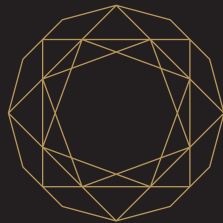
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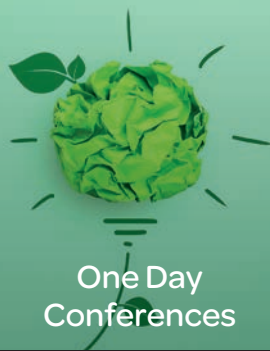
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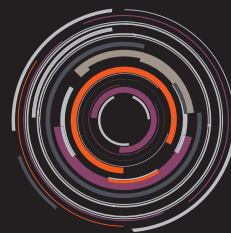
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"34% of women aged 20 to 24 in two Zambian regions **have faced physical violence"**

(p14)

"While some US fans were 'outcasts' due to their fandom, they celebrated it"

(p12)

"35% of UK and US fans felt that other fans are more aggressive today "

(p12)
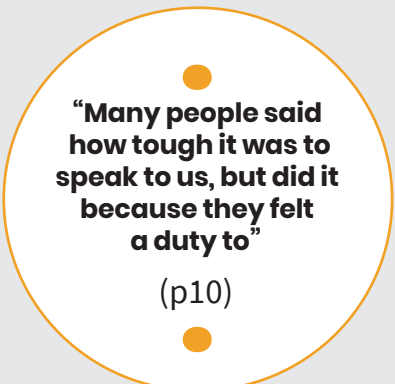
"More than 4,000 people responded to a call for evidence on discrimination in English cricket"

(p10)

"People are looking to find their own power and control"

(p16)

"Many people said how tough it was to speak to us, but did it because they felt a duty to"

(p10)

Hit for six

In June 2023, the Independent Commission for Equity in Cricket, formed in 2021 by the England and Wales Cricket Board, published a 140-page report on discrimination in the sport, the result of a two-year investigation. It found that racism, class-based discrimination and sexism were widespread, and offered recommendations including equal pay for female cricketers and increased diversity at board and management level.

Marie-Claude Gervais, who led the research supporting the investigation, discusses her experiences with Liam Kay-McClean

What was the premise of the research?

The England and Wales Cricket Board (ECB) wanted to better understand the lived experiences of discrimination in the game. We were hoping we might have 400 respondents [to the survey], and it turned out to be more than 4,000. Much credit should be given to the ECB and the commission for promoting the project and encouraging people engaged with cricket, in whatever capacity, to share their stories of exclusion and inclusion in the game.

Did the high-profile nature of the issue have an impact on methodology?

The presence of the ECB is a strength and a weakness. Some people may have felt that the ECB was best placed to sort things out and, therefore, it was worthwhile contributing their views. Other people might have felt there was little point in contributing if the ECB managed the process. The creation of an independent commission addressed that lack of trust. Independence, transparency and accountability were clearer, which was helpful in increasing confidence and, therefore, willingness to take part.

From data-protection, confidentiality and participant-safety perspectives, the process needed to be rigorous. That goes beyond anonymisation – removing a name, when numbers are small, doesn't protect confidentiality. Also, some people didn't want to revisit experiences that were really painful. Many said how tough it was to speak to us, but they did it because they felt a duty to improve the state of the game.

How did you take intersectionality into account?

Before we looked at intersectionality, we examined people's engagement with the game. Were they recreational players, professional players, coaches, umpires, working for the ECB, parents of children taking part? There were decisions to be made around social class – it is notoriously difficult to measure. The simplest and most relevant way was whether people had attended a state school or a private or grammar school. It is a bad proxy in many ways, but it was relevant to cricket.

From a quantitative perspective, we analysed the data by types – one type was people with intersectional advantages. We then created types of intersectional disadvantage – gender, sex, class and race. You could see the key drivers of discrimination, and ethnicity was the main factor. It was fascinating to see that people were so clear about the reason they got discriminated against – what dimension people react against. We were clear we didn't want to go back further than five years, as we wanted to be able to say that these are ongoing and contemporary experiences – if we had a suspicion the experience was older than five years, we excluded it.

The research team met regularly, because it felt important, from a safeguarding point of view, to have an opportunity to debrief,

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> "When the majority remains silent, it allows bad behaviours to carry on. It is isolating for the victims – they feel alone, powerless and distrusting of the people around them"

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share and report back, and for people to get things out of their system. It is a big burden to carry – I wanted the team to be aware of when to escalate to me. What people could hear as researchers could be triggering and feel very real – it is one thing for me to hear about Islamophobia, it is another for someone who is Muslim to hear about someone using a prayer mat to clean up after sex, for example. I felt I had an even greater duty of care to the team because of its diversity and the potential for hurt.

Were there any experiences in the research that stood out?

One thing that stood out was the value of comparative research – using a single process to compare a whole range of experiences, as you see the patterns so clearly. A second thing that stood out was the importance of leadership and modern professionalism in the management of cricket. It means being

self-aware, and having due process, transparency and accountability, a complaints process of which people are aware and in which they trust – and which is acted upon – proper redress, and a concern for diversity and inclusion. If we got the basics right, so many issues would be sorted.

When the majority remains silent, it allows bad behaviours to carry on. It is so isolating for the victims of discrimination – they feel alone, powerless and distrusting of their colleagues, the people around them, and the institution. We have to be allies, and this means pointing out, in a clear and consistent way, if basic decency is not honoured in an organisation.

There were numerous examples of discrimination. One university men's team had more money allocated to their drinking budget than the women's team received in total; there simply aren't facilities for women – there is no place for them to shower, for example; women play after all the men's and boys' teams.

There were plenty of sexist, racist, Islamophobic and homophobic incidents. Class is less obvious, as a lot is structural, institutional and systemic.

What are your thoughts on the independent panel's recommendations?

They have been bold and ambitious, as they should be. What the panel has done incredibly well is to make recommendations that are addressable by cricket. It is easy to say cricket is a microcosm of what is happening in society, and the commission has been brilliant at focusing the recommendations on stuff that is incontrovertible.

The panel had a timeline for the ECB to act on the recommendations, and to track and monitor progress against specific outcomes. That's how you manage an organisation – you use data to change policies and evidence to drive the change you want to see. Every other sporting organisation should do that.

● *Marie-Claude Gervais is insights director at The Foundation but conducted this research while she was research director at Versiti.*

Finding your own people

Fandoms offer people space to indulge their interests and find belonging and joy, research from BAMM has found.
Paul White **reports**

In a world where bad news seems to stack up daily, people are turning towards fandoms for solace, meaning and joy. These are places where people feel free to be themselves and pursue the things that make them feel good. Fandoms are nothing short of happiness factories.

What is a fandom, exactly? Put simply, it's a subculture of fans characterised by feelings of empathy and camaraderie with others who share a common interest.

As fandoms grow in size and power, learning more about and understanding their rules is key if brands are to engage authentically and additively. What better way to connect with an audience than through something they love?

BAMM conducted a global study to comprehend fandoms fully and help our clients engage effectively without detracting from the fan experience.

Our research approach was multifaceted, incorporating culture scraping, online conversation analysis of internet fandoms, expert interviews, ethnography (14 in-depth interviews and four groups across the US, UK and Spain), and a quantitative nationally representative survey of 1,000 fans, from across the US and UK.

We found a rich space in which people can pursue their interests without fear of judgement, experience belonging, and find meaning and joy. We began this project assuming that fandom was a new

phenomenon, but our research quickly revealed otherwise. One of the first sci-fi conventions, Philcon (the Philadelphia Science Fiction Conference), was held in 1936. Fan behaviour – as we know it – is almost 100 years old, but, really, this behaviour is universal. Is coming together to celebrate your love for *Buffy the Vampire Slayer* really that different from any other pilgrimage?

Fandoms are often found almost by accident; 69% of fans came across fandom through a person in their life. While not everyone remains in every fandom they join, those who do stay often do so for the social aspect of it: one in two fans we surveyed said that fandoms provide them with a sense of community and belonging.

Shared histories and norms

Armed with this thinking, we delved further in our qualitative research, uncovering key commonalities across fandoms, regardless of their fan object.

All fandoms incorporate rituals (think of Liverpool Football Club singing *You'll never walk alone*), have their own language (Lady Gaga's Little Monsters), connect via quite subtle symbols (modes of dress), and have a shared history ('growing up' with Justin Bieber).

Each fandom has a doxa – a guiding set of principles that evolve as any other cultural rules do. This creates intricate rules and

42% of those surveyed by BAMM felt that being a fan was as important as the other relationships in their lives

expectations that fans may not be able to easily write down as a set of commandments – which makes for shaky ground when brands want to engage. Consider the Ultimate Fight Championship, known for no-holds-barred fighting in metal cages, introducing the idea of slap fighting as a new sport – their fans were turned off entirely.

Of course, this can lead to toxicity within fandoms, which has been accelerated by online platforms.

While social media has enabled fandoms to flourish and grow faster than before, they also expose fans to much more negativity and toxicity, at scale.

Differences between the US and UK were subtle, but notable. Our US ethnographies were more emotionally open, with fans willing to share more.

They pointed out that fandoms were more

> "While not everyone remains in every fandom they join, those who do stay often do so for the social aspect of it: one in two fans we surveyed said that fandoms provide them with a sense of community and belonging"

10% reported that they had missed an important life event, such as a birthday, anniversary or wedding, in service of their fandom

35% of participants felt that fans are more aggressive today than they were in the past

open and accepting, and while some US fans considered themselves 'outcasts' as a result of their fandom, they leaned into this and celebrated it. They made it part of their personality and identity. As it was so linked to their sense of self, they were more critical of their fan object and probably more likely to leave a fandom if something didn't align with their values.

In the UK, fans were more reserved. Despite being interviewed in veritable fan shrines, many felt they weren't 'true' superfans, compared with the other people they knew.

There's that self-deprecation!

As fandom in the UK seems to be more of an online pursuit, with fewer real-world events compared with the US, fans were a little less overtly enthusiastic.

Feeling more distant from their fandom, they were less likely to leave if something they didn't like occurred, as their sense of self wasn't closely tied to it.

Don't veer off course

Our qual team faced some interesting challenges when it came to engaging with fans. We considered two approaches.

● Go into each interaction 'knowing nothing' and encourage people to share their knowledge with you.

● Do enough background research about a fandom to have at least a basic conversation and prove your worthiness.

On balance, both approaches worked, and the team was nimble enough to decide when to use what approach.

Another difficulty we encountered was how tough it can be to interview someone about something of which you're already a

fan. As a fellow fan, the natural inclination is to veer off course and start discussing minutiae and your own interests. More than once, the team had to rein themselves in to ensure we were able to find what we needed.

So where does that leave us? Fandoms are only growing stronger and more connected over time. For brands seeking to engage people in an inherently joyous space, nothing is better than fandom.

Those brands that choose to do so will need to ensure they do their research before entering.

Seeking to exploit a fandom without participating in it and adding to it authentically will be found out quickly, and punished severely.

● *Paul White is strategy director at BAMM*

Spreading the word

BBC Media Action research has focused on the outcomes of efforts to tackle gender-based violence in Zambia using radio.
By Liam Kay-McClean

In 1993, the United Nations published its Declaration on the Elimination of Violence against Women, recognising that it constituted a violation of their rights and fundamental freedoms. But violence against women remains a significant problem globally, and work continues to address the issue and achieve that aim of a gender-based violence-free world.

In Zambia, the BBC's international development charity, BBC Media Action, has been working on a project to help reduce gender-based violence in the country's Northern and Luapula provinces, where the problem is especially acute.

The charity set out to address the issue in 2019 through radio programming, backed by funding from the European Union and supported by the government of Zambia, World Vision, GIZ, Lifeline/Childline and Norwegian Church Aid.

The campaign, Natwampane – which means 'coming together' in Bemba – aimed to decrease gender-based violence in Northern and Luapula provinces. It involved 15 radio stations producing three weekly magazine programmes covering gender equality themes and signposting services provided by the state and charity partners for those affected. Stations broadcast the adverts multiple times a day to help spread the message.

Nick Chasimpha, research manager, Zambia, at BBC Media Action, says there had previously been successful interventions to reduce high rates of gender-based violence in other Zambian states. "It wasn't surprising to see the Northern and Luapula regions had the highest rates, because there has been very little activity to address the problem," he adds. "We are trying to address this with drama, public service announcements, and with our discussion programmes."

To evaluate the success of the radio programming interventions, BBC Media Action conducted 1,003 face-to-face interviews with participants aged 15 to 49 across the Northern and Luapula provinces in April and May 2022. The research found that 84% of respondents had listened to either the radio discussions or advertisements, with 37% adding that they discussed the issues showcased in the programmes with friends and family.

The research found:

69%

reported the programmes were useful to a great extent, and that the stories the programmes covered resonated with them

60%

of regular listeners, compared with 40% of non-listeners, said they would report an incident of domestic violence to the police

Breaking the cycle, tackling cultural norms
In the Northern and Luapula regions of Zambia, 21% of 15- to 19-year-old women and 34% of 20- to 24-year-old women had experienced physical violence after the age of 15 – in most cases, from current or former husbands and partners – according to the 2018 Zambian National Demographic Survey. The research also found that, in these two provinces, four in five women believed that husbands beating their wives is justified for reasons such as burning food or arguing with their husband.

© BBC Media Action Zambia

Regular listeners reported women had more rights and could make more decisions – for example, choosing a spouse or deciding the number of children to have. Regular listeners, on average, ascribed more rights to women (mean of 6.4 out of nine) than those who listened occasionally (6.2) or did not listen at all (5.4).

The same pattern appeared when questioned about nine statements on gender equality, including whether it is only right for a man to initiate sex or if women should be able to decide what they wear, with regular listeners (5.2) agreeing with more statements than occasional listeners (5.1) and non-listeners (4.7). Regular listeners were less likely to attempt to justify domestic violence (56%) than non-listeners (83%) and occasional listeners (69%).

Kaushiki Ghose, senior research manager at BBC Media Action, says: "We still have quite a few respondents saying, for instance, that they should not speak out when beaten, or that real men never cry. Our listeners show more positive and progressive attitudes, but these attitudes are very deeply ingrained in the culture.

"It isn't just about 'what I think I should do', but also 'what I think others are doing', and 'what others expect me to do', and 'are there sanctions attached if I don't do something'. 'If I defy cultural norms and start doing something differently, for instance, if I speak out when I am beaten, am I actually questioning the fabric of the family?'

"It's these kinds of things that make gender norms hard to shift. We are seeing positive results among people who listen, compared with those who don't listen, but norms are deep-seated and harder to shift."

Perhaps the biggest implication of the research was that media has a strong role in tackling deeply ingrained issues within society. Cynthia Musonda, research and outreach officer, Zambia, at BBC Media Action, explains that reinforcing information about gender equality across different channels helped spread knowledge about the subject better across the community.

"People heard information on the radio. We also had listening groups in the different communities, and these groups were given Natwampane T-shirts," she says. "So, when anyone in the community would see someone wearing that T-shirt, they would ask them for information.

"We also equipped our listening-group members with information on where to access services. This worked very well, because they could signpost people towards services in rural areas."

Researchers will carry out further qualitative work to build on the findings and understand more about the underlying causes and reasons why people were still justifying abuse. In the meantime, the results demonstrate the importance of partnership work on important societal issues.

"This was a complex project – we had a number of partners on this project, both international and local," says Chasimpha. "We had to conduct training on the ground, with religious leaders and marriage counsellors, because people get information from different sources. We needed to involve all different stakeholders to try to address this issue.

"We learned that media efforts, which seem to have yielded great results, must be complemented by activities and outreach on the ground – media alone is not enough."

Who pulls the strings?

Algorithms have a huge influence on what we see online, getting personal in their recommendations and seemingly knowing us inside out. Now, some people are consciously adapting their behaviour to regain control. By Katie McQuater

Earlier this year, a BBC journalist wrote a report about how Netflix and Spotify seemed to 'know' she was bisexual before she herself did, when she reflected on the suggested recommendations she had received.

It exemplified how algorithms have become an intrinsic, increasingly personal part of contemporary online life, reading signals such as search history to serve us content, recommendations and advertising.

While they have a clear commercial imperative, algorithmic recommendations have democratised popular culture to an extent. Whereas 30 years ago, magazine reviews or the Official Charts (see p18) might

have been the only ways to discover new music, Spotify today offers a plethora of playlists tailored to individual tastes.

On the other hand, algorithms can also be a blunt tool, grouping people by obvious demographics and reinforcing stereotypes – leaving us feeling annoyed at being targeted with unsolicited weight-loss content in January, for example.

With increased awareness of algorithms in our lives, there is a shift towards reassessing the role they play – and in some cases, people are changing how they interact with platforms, to change the dynamic.

For example, reports of dating app users 'hacking' the settings highlight a desire to reclaim agency over the types of potential love interests being suggested.

"The whole idea of a dating app is that you have more choice and control over who you meet, and the algorithm has taken that control away," says Katrina Russell, associate director at semiotics agency Sign Salad.

Other examples include adjusting Instagram's settings to change what advertisements appear, or actively 'liking' certain content to see more of it.

Russell thinks there is a wider trend for hacking algorithms, but says it's not about people turning away from them – but working out ways in which they can have more choice.

"Finding a creative way to gain more control is an appealing concept. Given the prominence of a lot of big players in tech, people are looking to find their own power and control," adds Russell.

The take-up of algorithm-free social platforms such as micro-blogging site Mastodon and RTRO (which pitches itself as 'non-toxic social media'), hint at this desire for control – as well as a rejection of big

tech's hold over what some see as the 'public square'.

The original forms of social media tried to create 'a more horizontal space', says Russell, but that has now changed. "That feeling of even-handed representation has, for many people, been distorted by algorithms. It's not so much that the problem is the algorithm itself, but rather the specific algorithm that is being used by each platform."

Russell adds: "The ultimate idea of the algorithm is to keep a seamless flow of cultural content and to reflect people, rather than make people feel that they can see the demographic bucket that they have been put into – which, for a lot of people, is not appealing."

The impact of algorithms extends far beyond recommending products, and 'switching off' isn't easy in modern life. Some young people have reported using TikTok, for example, to effectively self-diagnose health conditions after being served with highly individualised content.

With social media apps having such immersive layouts, it can be hard to separate your own motivations and preferences from what you are seeing.

Russell says: "There is a real challenge around being able to ignore, or to not identify, with what's being said to you – it's literally called a feed."

Cultural currency

While evidence is scant on this emerging topic, studies of how young people engage with algorithms offer an insight.

For the most recent edition of its *Almanac* publication, which came out earlier in 2023, US youth culture agency Archrival fielded research looking into algorithms, with a focus on Generation Z – a group of people

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Alternative inspirations

● **Self-publishing platform Substack hit more than two million paid subscribers in 2023.** It connects writers directly with readers and eschews algorithms and advertising.

● Archrival qual found young people reporting that they were not going to Spotify to discover new music – instead visiting New York's public parks to look for buskers. Another study by the company found that **53% of young people claim they prefer to discover new products in store**, not through social media.

● The **'Luddite Club'** is a group of teenagers that meets regularly in New York, **putting away smartphones and promoting a lifestyle free of social media** (the *New York Times*, December 2022).

that has never known a world without them.

Half of participants agreed that 'their algorithm' knows their tastes and preferences better than their parents do, and 44% agreed that 'my algorithm rarely surprises me'. Another half say they have 'trained' algorithms to show them more specific content or products – for example, by actively engaging with certain pages.

Bayla Metzger, senior editor at Archrival, says: "This generation has their finger on the cultural pulse, but they also find the cultural ecosystem overwhelming. So, they try to navigate overwhelm but they also know algorithms can help them with that – making things more personalised and customised to their taste and interests.

"However, there are negative sides that they are aware of: it can keep them in a taste bubble that's of their own making."

FOMO (fear of missing out) plays a role, says Alex Gordon, chief executive at Sign Salad. "There is a pivot between wanting access and receiving information that you want – FOMO is a major concern – versus the desire to control, and be able to curate, what is available to you. There is a fear of both missing out and not having control." This trade-off is at the centre of a current cultural moment, with younger demographics in particular wanting to maintain cultural currency while simultaneously understanding they are 'subject to the whims of an algorithm', adds Gordon. "We haven't quite reached that point where we want to let go wholly of content or have a much more managed curation of the content we receive," he says.

Gordon predicts tools such as cookie management will become less cumbersome in future, making it easier to curate things ourselves.

But it's unlikely that people will reject algorithms completely.

Says Metzger: "We also hear that social media and algorithms are a necessity. In a lot of ways, Gen Zs have made peace with the fact that this is the world they live in."

"We hear that social media and algorithms are a necessity. In a lot of ways, Gen Zs have made peace with the fact that this is the world they live in"

Signed, sealed and delivered

The Official Charts have been documenting music tastes for decades. With new platforms growing in prominence, chief executive Martin Talbot tells Liam Kay-McClean **about how his job has become more complex – but fascinating**

For a first gig, Stevie Wonder at Earl's Court, London, in 1984, takes some beating. Wonder reeled off hits including *Superstition*, *Isn't She Lovely* and *Signed, Sealed, Delivered (I'm Yours)*, as well as songs from his vast back catalogue.

Martin Talbot, chief executive at the Official Charts Company, was in the audience that night for his first live concert, and has remained a huge fan of Wonder ever since, last watching him on stage in 2019, in Hyde Park. But it is that 1984 gig that remains one of his all-time favourites. "To see an artist like that in his pomp, in the early 1980s and just coming out of his peak in the 1970s, was amazing," he says. "I didn't grow up in a big city, so I wasn't fortunate enough to go to gigs constantly throughout my teens. Stevie Wonder had a massive impact on me at that age."

Fast forward four decades and Talbot is very much a veteran of the music industry, albeit not in a recording capacity. After a three-year spell as a journalist at the *Hackney Gazette* in the late-1980s, Talbot moved into music journalism, focused on business-to-business (B2B) publications aimed at music sector professionals – *Fono* and *Music Week*, both of which he edited, and a brief spell on the news desk at *NME*.

"I never really considered myself as a music journalist – I was more a business journalist covering the music industry," Talbot says. "I found working in business media more invigorating and more interesting as a journalist – you could dig into more stuff; there were a lot more angles and things going on you could cover. There were various copyright tribunals, such as George Michael taking legal action against Sony Music – there were always interesting stories to get your teeth into."

Then, in 2007, came the chance to move to the UK Official Charts Company, first as managing director and then, in 2013, as chief executive. "It's been the role of a lifetime to have the opportunity to manage an organisation that is a national institution," Talbot says. "I am very aware that there are decades of history in the charts in the UK, and I have been around for only a small proportion. It is quite an honour to do that, particularly at a time when the industry has changed so much."

Different tracks

Despite working in and around the music industry for 20 years before moving to the Official Charts Company, Talbot accepts that his current role is quite a significant shift from that of working as a journalist.

"For anybody who makes the transition to running a business for the first time, it is a learning experience," he explains. "Every day is a learning experience – particularly as I have not grown from within the business, but come from outside of it."

Music Week was a publisher of the Official Charts, so Talbot already had a business relationship with the Official Charts Company, and knew the team and its work, albeit not the day-to-day minutiae. "When I came to the Official Charts Company, I already had experience of managing a team," he says. "I had some really good mentors as well – people I have worked for who I'm still in touch with. I learned a lot from them about how to manage.

"There's not a guide on how to do the job of chief executive – you have to make it for yourself and make your own way of doing it. I'd come from a journalistic background, and a lot of editors end up becoming publishers. Being a publisher of a magazine or website is not that dissimilar to being the chief executive of an organisation like the Official Charts Company. We create content and we commercialise it."

Talbot says the key has been to surround himself with people who are experts in their field, and he tries to avoid too much hands-on management of the content side of the business. The Official Charts have been around since the 1950s and the Official Charts Company since the 1990s, but it was only in 2011 that the business adopted a logo and branding, and launched a website

to allow more direct access to the singles, albums and specialist charts for music lovers. The company has recently presided over a brand refresh, leaning away from a B2B image towards that of a 'punchier, consumer-facing brand', says Talbot, to maintain the charts' roots in appealing to teenagers first and foremost.

"If you go back to the 1950s, when the charts first started, it was all about rock 'n' roll music and teenagers rebelling against their parents, and that was played out in the singles charts at the time," Talbot says. "There was the same in the 1960s, 1970s, 1980s, 1990s, and still is today.

"Occasionally, you get lots of middle-aged journalists talking about how the charts don't mean anything to them any more. They're not designed for middle-aged men, frankly – the singles charts are designed for a teen audience."

● **"If you go back to the 1950s, when the charts started, it was all about rock 'n' roll music and teenagers rebelling against their parents"** ●

Alternate takes

With new generations have come new ways of consuming music. Vinyl was king in the 1950s, before being supplanted by cassette tapes, CDs, downloads and streaming, before making a comeback of its own. As the man overseeing the UK's charts, Talbot has been in charge during a time of intense flux. Streaming was first added to the Official Charts in 2014 and is now the world's most popular method of music consumption, led by firms such as Spotify, Apple and Amazon – Spotify alone has 500 million users, according to the company's figures from April 2023. In addition, there has been an accompanying proliferation of charts run by individual streaming companies, setting out the most listened to artists and songs on their platforms.

"When I joined, downloading [records] was relatively new, was yet to reach its peak, and then streaming came along and has

Martin Talbot with Ed Sheeran

"Something needed to make sense of the chaos of all of this music being created. What better than a chart that reflects consumption across all age groups and demographics, across the whole country"

transformed everything again and created other challenges," Talbot recalls. "Something needed to make sense of the chaos of all of this music being created. What better than a chart that reflects consumption across all age groups and demographics, across the whole country. The chart we create isn't just taking data from one particular platform – it is taking data from all of them."

The Official Charts Company gathers data, with support from Kantar, from 8,000 sources daily – from major streaming services to online and high street retailers, supermarkets and independent record shops. The data it gathers equates to more than 99% of the total UK singles market, 98% of the albums market and 90% of the country's DVD market. In comparison, the first UK chart – the brainchild of NME publisher Percy Dickens and printed on 14 November 1952 – was based on about 20 phone calls to record shops. The first number one? Al Martino with *Here in My Heart*.

Data quality was a challenge when streaming first arrived –

especially when adding large quantities of music-listening information to the charts daily – and streaming companies had to be able to supply information at a robust enough level of quality to meet the Official Charts Company's standards.

"When streaming came into the singles charts, it was a growing, but small, part of the market," Talbot remembers. "Often, when you have new areas of consumption that are evolving, the companies that are selling those products and formats are not necessarily set up to deliver data to the quality we require it."

Data is gathered from suppliers every day by 5am, with the Official Charts Company updating the charts at 10am with further sales flashes daily. There is a need for quality and robust data, and the company has worked to ensure it gets sufficient quality and quantity from streaming platforms and other music retailers.

How has it felt to preside over the Official Charts at a time of such flux in the music industry? Talbot reflects: "I remember seeing a managing director of a major record label on a panel recently, and someone said that his job must have been tough. He said it was not – that it was a privilege to steer the record label from one era to another and manage that transition. I feel the same way about the charts. It is much more complex than it used to be, but that's what makes it fascinating."

Skipping a track

Streaming is no longer the new kid on the block in the music world, but some of the challenges it has presented to the singles and albums charts remain. The algorithms that power many streaming platforms, for instance, have provoked ire in some quarters in recent years over the way they promote particular songs and artists, with some people keen for a more serendipitous way of discovering new music.

The Official Charts Company recently published a report called *The People's Algorithm*, a piece of work carried out with CultureStudio and with 1,121 respondents across two surveys. The research explores the role of the charts for algorithm-weary music fans who are looking to escape heavily personalised content-recommendation feeds. Among the findings was that 69% of charts followers say that the charts are their top means of discovering new music. "Three or four years ago, the idea of algorithms feeding you stuff you might like based on what you have already explored or enjoyed was being pushed forward as great and positive," says Talbot. "I think the tide has turned a bit, and algorithms are now pushing things that people don't really want."

The company's website attracts 3.1m visits per month, with 13.5m views of Official Charts video content generated monthly and 370,000 subscribers listening to its playlists on their favourite streaming platforms. Talbot is a big fan of the Official Charts' more specialist charts and argues that they can provide a timely anecdote for algorithm-sceptic listeners.

"The specialist charts are all about introducing people to music. Lots of my favourite artists would be appearing more on the specialist charts than the singles and albums charts," he explains.

"The main charts have always been about the mainstream – the most popular and, therefore, the biggest artists of the minute.

But there's so much beneath it. That's why the specialist charts are there."

The challenges do not stop there. Artificial intelligence (AI) has the potential to deeply affect the music world, with outlooks ranging from optimism over how it could revolutionise music recording and preservation to deep concern that AI could end up undermining the music industry in ways that were previously unfathomable. Earlier this year, for example, there was a debate about Sir Paul McCartney using AI to create a 'new' Beatles track using previously unreleased John Lennon vocals.

Talbot thinks that there is a lot to contemplate – AI could prove useful for recording artists, but his focus is on the potential copyright implications of the technology and its impact on the charts. With AI being in its infancy, the Official Charts Company is keeping its powder dry for the time being, and focusing on ensuring that copyright laws and musical integrity are upheld, while analysing longer-term issues stemming from the deployment of AI in the industry.

Talbot says: "What does it mean if Sir Paul McCartney and The Beatles use it to enhance a John Lennon vocal? Is that legitimate or not? I don't think there is anyone who would argue The Beatles example wasn't legitimate – technology has been used for years to clean up and help the creative process.

"It is important to emphasise that much is still to be debated and settled. The one clear line we have is that, if someone is breaching copyright to create something, that is not good, and nobody wants to see that in the charts."

B-side

As you might expect, given his career trajectory, Talbot is a big music fan himself, spending his summers travelling to music festivals, including Latitude in Suffolk. When we speak in July, Talbot has just been to see Bruce Springsteen and the E Street Band – his wife is a huge fan – and Pulp in London.

Prince is a particular favourite – Talbot was lucky to see his *Sign O' The Times* tour in Paris in the late 1980s to promote the album of the same name. "Talk about being at your pomp – he was absolutely 100% at the top of his game," Talbot recalls. "That tour didn't come to the UK, and me and a friend had the foresight to buy a coach trip to Paris to see the gig. He was, and still is, the best artist I have ever seen. He was absolutely in a different class.

"If you really love an artist, go and see them when they come around. Even if you have seen them before, go and see them again – you never know, it might be the last one."

Whatever happens, Talbot expects that the Official Charts will long outlast new technologies and remain relevant to new generations. "When streaming emerged," he says, "a lot of people thought there wouldn't be any other way of delivering music. One thing we have learnt from the past 60 years is that there will always be change.

"The charts provide a narrative for the history of popular music. They provide a hook for our nostalgia about music – we talk about the single that was number one on the week we were born. The charts have huge value and power. I have no doubt we will still be here and doing what we do."

Ear to the ground

In an ever-shifting environment, good foresight builds resilience for what the future may bring. Rob Gray **reports on the rise of foresight, why it means more than making predictions, and why people must be at the centre**

I n 2011, philosopher Derek Parfit wrote: "We live during the hinge of history. Given the scientific and technological discoveries of the last two centuries, the world has never changed as fast." Parfit died on New Year's Day 2017, so did not witness the Covid-19 pandemic and a further acceleration in change that swept in with it.

The shock and dramatic upheavals of the pandemic led many businesses to realise they could no longer rely on looking to the past to plan. Today, in an uncertain world awash with new technologies and complex macro issues – such as high inflation, the cost-of-living crisis and the climate emergency – brands and organisations need to understand how the commercial and social landscapes are being redrawn, and take steps to minimise the risk of getting caught out by what may lie around the corner.

As a result, there has been an increased focus on foresight. New heads of foresight roles have sprung up across a wide array of organisations and more business leaders have begun to think of it as a tool not only to help with innovation, but also to embed resilience. Earlier this year, Jesper Brodin, chief executive of Ikea Retail's parent company, told the *Financial Times* that Ikea was taking a new approach. Instead of setting out specific goals for the year, the business has 'scenarios' acknowledging the possibility of substantially different outcomes. This, Brodin explained, is to give the business wiggle room if the picture changes and to build (without an allen key!) more agility into how it operates.

"Many clients are coming to us wanting to know more about what the future holds because of these crazy uncertain times," says Amy Concannon, practice director, foresight, at C Space. "They are trying to understand not only who today's consumers are, but also how to better plan for five-plus years' time. I think consumers are often lost in the foresight conversation, because it's easy to get carried away by all these cool, glamorous trend reports. I'm on a bit of a mission to figure out how we can work with consumers to help ground foresight strategies – make it less 'pie in the sky' and more practical for businesses."

C Space has worked with brands such as Ikea, Jaguar Land Rover and Allianz on foresight projects, and Concannon points to a series of trends driving a growth in interest. Five challenges that C Space has from clients are: data overwhelm – more data means more confusion; rapid change – the world is changing in unexpected ways; lazy trends – trends are malleable and you can make your own story with them; lack of focus and difficulty distinguishing between big macro forces that will disrupt the category versus short-term fads; and inaction – brands are firefighting and it's hard to get the business to act and care in the long term.

"We're trying to push our clients towards thinking more about what the opportunities could be," adds

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"Weaving together insights can better prepare us for what may come next, but we often forget that we also control the future. The future is not fixed nor predetermined"

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Concannon. "Often, foresight is seen as being about de-risking decisions and strategy. But if you spend all of your time doing that, you might end up like Blockbuster and not see what's happening outside of your category."

Matt Klein, head of global foresight at Reddit, takes the view that foresight is the responsibility of every department that will be affected by the future – which, ultimately, makes it everyone's concern. For insights teams, he suggests, it's worth viewing foresight not as another siloed practice, but as a perspective that runs horizontally. In other words, foresight or interrogating the status quo, and cleverly game-planning threats and opportunities, should not exist in isolation, but should be integrated across countless types of workstreams.

Foresight should never be thought of as 'predictions', Klein elaborates. "While it's absolutely impossible to predict anything for certain, we can prepare. Foresight is about understanding our current context, the past, and today's signals of change – all so we can, ultimately, act or not. Weaving together these insights can better prepare us for what may come next, but we often forget that we also control the future. The future is not fixed nor predetermined.

"With this in mind, large organisations can find themselves influencing what may come next. Consider it like a snake eating its own tail. Organisations create culture as much as they study it. For this reason, when thinking about our future, we must consider what ethical, diverse, equitable, sustainable, peaceful, exciting, or rewarding futures we want to see. Ultimately, organisations get to help author them."

Cross-functional cohesion

Andrew Curry, director at the School of International Futures (SOIF) – a not-for-profit practice using strategic foresight to help policymakers and business leaders make change for the better – was previously director at Kantar Futures. In his experience, one big problem with foresight and futures work is that, when done well, it's interdisciplinary and needs to work across functions. As most organisations are highly functional, foresight work can easily fall through the cracks.

Broadly speaking, Curry says there are two ways to fix this. "The first is to give it to a director where it fits, and who is interested – chief marketing officer, chief strategy officer, chief growth officer – and ensure that, culturally, the rest of the SMT [senior management team] pays

"Futurists said they had warned about a pandemic for years, but the vague warnings they gave were all too easy to ignore"

attention. The other solution, which I saw working well in a big client organisation, is to have a small, but senior, team reporting directly to the chief executive. This also seems to get the attention of the rest of the senior management team."

In 2019, while still with Kantar, Curry – with Julie Kollman – co-wrote a report, published by MRS, on using 'intelligence capital' to drive business growth. As such, he has clear views on the interplay between foresight and insight. "You're looking for signs of change and, obviously, good insight is part of that. In particular, good insight will pick up shifts in attitudes and values. It should also notice evidence of pain points and, as long as you're looking beyond your customer data for insight, leading-edge behaviours that are expressions of values shifts and pain points. But the broader point here is that you're looking for patterns. These consumer insights are almost always connected with other changes in the environment – and this is a good thing, because it gives you more confidence that the change you're seeing isn't just a data blip or a fad."

Nick Chiarelli, UK practice lead, Ipsos Trends and Foresight, observes that he is old enough to recall a time before we had 'insights', or at least didn't brand them as such: 'the days when we were market researchers, pure and simple'. Then, Chiarelli notes: "We got rebadged to 'consumer insights'. Nothing much really changed – lazy researchers, or those reacting to limited or

unimaginative briefs, provided raw numbers, but most were always looking for something more in the patterns. I worked in mainstream market research before getting my start in the world of trends, so, to me, this is all somewhat of a continuum."

Chiarelli believes any good insight has some element of future thinking within it – meaning it shouldn't just hold for today, but for some amount of time into the future, too. The distinction he makes is that insights attempt to provide some kind of truth, while foresights must recognise the inherent instability and unpredictability of the world of tomorrow. The further ahead a foresight seeks to look, the more unstable it becomes.

Trends are about taking the world of today and pushing it as far out as can be done before it starts to break down – looking 'present-forward', in Chiarelli's words. How far it can be pushed depends on the kind of foresight. For example, foresights based on demographic trends are more solid and easier to push further. It's harder to do this with those based on social change.

Ipsos tends to avoid positioning its work as being about making predictions, says Chiarelli. Yes, with short-term trends, its clients are concerned with how they can act over the next one, two or three years, so plenty of work is done on what trends might look like over that time – what kind of disruptions might pull the rug out from under these trends and how they might

subtly evolve over this timeframe. Yet, even within this timeframe, Chiarelli concedes the past few years have shown how fragile the 'present' is, and how easily assumptions and expectations can be undermined by disruptors such as a global pandemic.

"Of course, you will have seen no end of futurists saying they had been warning about a pandemic for years, but the kind of vague, general warnings they had been giving were all too easy to ignore, and this tells us a lot about what good foresight can and should look like," says Chiarelli. "Few of those supposedly warning about the threat from pandemics had any idea of the specifics: what the pandemic would be, where it would strike, how it would spread, and so on. Likewise, I don't recall seeing much that talked about the implications of a pandemic when it finally came: the fact we would be locked down, the impact on city centres, the near collapse of travel and tourism, the sudden growth of virtual solutions for learning, working and socialising."

This highlights that the value of foresight is 'not just in some headline prediction', adds Chiarelli, but in making it as specific as possible in identifying potential implications, actions and reactions. "If we talk about trends as being 'present-forward', we also need to think about longer-term foresights as being 'future-back' – we need to recognise alternative possible futures and then work back from there to think about how businesses can be as resilient and as prepared as possible for whichever of those alternative futures comes closest to the ultimate reality."

Global engineering and built environment firm Arup has a well-established in-house foresight team (part of its Arup University) and developed the concept of 'foresight by design', using design tools and techniques to bring new ideas to life and engage clients and stakeholders in conversations about change. Among its recent work is the report *It's Alive*, a conceptual vision for a 'living' socio-technological tall building in the year 2050 that imagines tall buildings fulfilling multiple roles in response to the changing needs of society and the planet.

Parallel possibilities

Foresight Factory co-owner and chief executive Meabh Quoirin says businesses can go wrong by trying to look at the future as a straight line. Far better, she asserts, to consider all the possible 'parallel universes' and then build out predictions for every audience, as there is a need to become smarter about who predictions are for. One of her clients, she says, has worked with Foresight Factory on all of the contextual pieces that can go into the scenarios in the first place – for example, building a range of scenarios with, perhaps, four personas in each.

"It's good to see people investing in taking the time to map those scenarios with a) different ingredients and

How E.ON drives foresight

In electric utility multinational E.ON, the foresight function sits within corporate strategy. With analysis made centrally, the team delivers and 'spars' on related insights and recommendations with internal clients in innovation, business development, risk, procurement, human resources, the board, and the supervisory board.

"In our analysis, we always strive for understanding and insights," says E.ON's head of foresight, Thomas Boermans. "What and who is driving a topic? What are the different interests? Who has opportunities and the means to drive change? This results in anticipating developments, important crossroads and related signposts, and makes foresight actionable as the future unfolds, rather than predicting an endpoint that might come or not."

The business carries out 'portfolio workshops', where a team's set of innovation activities is compared with the foresight function's view of the future (specifically, its Trend Radar and anticipated future customer drivers) and E.ON's overall strategy. The result, according to Boermans, is 'concrete possibilities' to shift, adapt or enlarge the innovation portfolio – for example, defining new strategic search fields for innovation.

"We are regularly analysing and updating the future customer drivers we anticipate along the energy transition [for example, the need for resilience]. We do this in cooperation with researchers and futurists based on trends in society or technology," says Boermans.

Results are used in the portfolio workshops and elsewhere. They describe what an innovation should look like – or deliver as value – in a specific field, to fit with future customer needs.

The heart of future planning

Strategic foresight is about expanding our vision away from assumed futures into alternative plausible futures that we might not have considered. Essentially, it's about thinking long range, with multiple futures in mind. Foresight tools such as scenario planning can be helpful for this, but if you don't have the capacity or internal expertise to do so, it can also be helpful to tweak decision-making practices and ask: "What assumptions are we making here – and what if we're wrong?"

At the British Heart Foundation (BHF), we have been increasingly investing in foresight as a strategic practice, and produce an annual external diagnostic report to help inform planning.

We are currently working on a longer-range horizon-scan project, to better understand key uncertainties and their potential implications on the BHF. We are also using tools such as scenario planning to build our organisational capabilities and inform functional strategies."

● *Leila Varley, strategy manager, futures and foresight, the British Heart Foundation*

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b) different outputs," says Quoirin. "But who will live these scenarios? Can we imagine what that's like? That requires different disciplines, different thinking, different toolkits – and that's interesting. But I do think it's making the work so much more robust."

Quoirin stresses that the human dimension is vital, arguing that people should be put into the scenario planning equation, both in terms of who designs it (rather than an over-relying on technology and straight lines), and who is going to experience the outcomes of it.

Jeff Roberts, partner, Dive Without Fear, has a succinct take on the rise of foresight work: "The most powerful businesses aren't those with the clearest plan, but those with the most places to jump. Effective foresights provide measured evaluations of emerging possibilities." Recognising and being prepared for what might come ensures the business knows where it can jump if needed.

Mintel, meanwhile, has been working with clients on what it calls foresight frameworks. Richard Cope, senior trends consultant at the company, observes that firms are increasingly open to being challenged and provoked with quite extreme scenarios that might threaten the status quo and their position. Consumers often hold the key, for although they might not be able to outline the future by answering research questions, their fundamental needs and desires – whether practical or emotional – remain constant, albeit, these grow at different rates because of the influence of macro forces.

"It's important to link foresight to consumer needs such as status, convenience, escapism or comfort," says Cope. "The voice of the consumer can also be a great way of bringing trends and foresight to life, by showing their openness to future innovations or scenarios."

C Space's Concannon is also enthusiastic on this point. "You can get consumers to be creative and think about the future, but only in the right way," she says. "Things such as creative visualisation or painting a picture of what the future could look like, and getting them to think about that. Or bringing in example technologies for them to imagine what's possible, or creating videos around what might happen in five years' time – priming people to think, in a creative way, about the future, because it's quite hard to do that without stimulus."

Last year, C Space joined forces with Innovation Everywhere – essentially the Lego Group's in-house consultancy – to clarify Lego's strategic offering. Lego is big on looking to the future, and within the group's Creative Play Lab there is a dedicated foresight arm, known as the 'futurology team'. It is driven by the belief that, if the company is to build the future of play, it needs to understand future scenarios of children's lives and how play might unfold within these possibilities.

"We are very lucky because our work is grounded within these scenarios from the outset – rather than them being one of many inputs at a specific stage within a project," says Innovation Everywhere lead Lizzie Carr. "Often, a member of the futurology team becomes an integral part of the project team, thereby fusing foresight into thinking from day one. By placing the future and its scenarios at the forefront of our innovation challenges, we can actively shape the future of play, from a user and futures perspective, from the outset."

Various approaches and methods exist to help people think more critically about their assumptions about the future, notes SOIF's Curry, which helps get to better

> "The most powerful businesses aren't those with the clearest plan, but those with the most places to jump"

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Better connect Climate and Customers to help your business thrive

Most, if not all measures to address climate change actually improve quality of life. What role will your brand play in this future Good Life?

VIEW ARTICLE

strategy and more profound innovation. Design futures, using images and objects, is one of them. Irrespective of approach, Curry asserts that success hinges on embedding it in organisational thinking and processes. Scenario planning, he claims, has become a bit old-fashioned because "its starting point on the 'decision focus' is reassuring to executives, but doesn't help businesses deal with a world in which expectations and values are changing quickly".

An example of SOIF's work is a project on the future of food environments for a charity seeking to improve food outcomes for lower-income households. Working with Shift Design, SOIF combined a horizon scan of relevant trends and drivers with depth interviews with leading-edge consumers on food habits. Putting these data sets together generated a set of hypotheses about spaces where change is possible, which were tested with different stakeholders, including consumers. Food for thought – or, perhaps, food forethought?

In times of substantial change, looking ahead can be overwhelming. Perhaps owning the future is not about one team trying to predict what tomorrow will bring, but rather a collaborative effort involving close and careful listening to those who will live it.

A practical guide to staying ahead in a fast-paced world

Foresight is vital to business success, but it's easy to overlook and ignore. Why? People are wired to think in the short term; foresight is inherently hyper-conceptual and intangible, and an overwhelm of trends and data makes it hard to know what to pay attention to. To tackle these challenges, C Space has developed three foresight principles, with tips on how to run successful projects.

Principle 1: Create trajectories, not just destinations
Foresight is very hypothetical, but working backwards from future visions can provide clarity and focus. Map future scenarios by using expert insights, tools and machine learning, and identifying patterns in macro forces.

Discover emerging needs and behaviours from underserved consumers and extreme enthusiasts, and involve everyday consumers to identify which needs are here to stay.

Principle 2: Focus on durable needs
It's crucial to view trends through the lens of human needs, as these are more fixed than the world surrounding them.
But to bring consumers into a future-facing project, we must help them feel the future.

Create the right conditions and space and use future-sounding/looking stimuli.

Design fiction can help make the abstract and utopian gritty and grounded.

Overcome biases and tap into unconscious knowledge by using techniques such as creative visualisation, Lego serious play, and prediction markets.

Find out what really matters by forcing new behaviours, and blend research methodologies – such as longitudinal, observational and deliberative approaches – to capture changing views and behaviours over time.

Principle 3: Get the business to care
Foresight can be vague, intangible, and out of reach, which is why many clients cite actionability as the main issue with future-focused projects.
To get businesses to care and act:
● Embrace co-creation by putting stakeholders and consumers in the same room to shape solutions
● Help stakeholders visualise and experience the future through sensory campaigns, newsletters, podcasts and immersive spaces
● Ditch lengthy reports and say 'hello' to playbooks and toolkits that provide useful frameworks, resources and strategic direction.
The ability to see around corners can be both exciting and daunting. By adopting a 'yes, and' mindset, however, and following our guiding principles, we believe these challenges can be reframed as possibilities.

● *Amy Concannon, practice director, foresight, at C Space*

Stay ahead with more humans and fewer robots

Three principles on how co-creating with customers can make your foresight strategy more inspiring, relevant and actionable.

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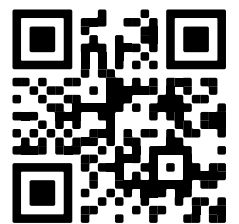
Hitting the
accelerator

The world of luxury is changing, but carmaker Aston Martin is racing to stay ahead of the competition and in its customers' lives. By Liam Kay-McClean

I f you had to choose one fictional character who best encapsulates 20th-century, old-school British 'glamour', you would be hard pressed to think of an alternative to James Bond. He had the clothes, the martini, the lifestyle and, arguably most importantly, the car. That car was most often an Aston Martin.

Since its founding more than a century ago, Aston Martin has become a byword for British luxury, a premier sports car often seen in 'racing green'. In the years since, it has kept its allure, even adding a Formula 1 team in the process.

Yet, it is an interesting time in the luxury market, and a difficult one for the car industry. On the one hand, the market is evolving as a new generation comes on to the scene, and there are increased opportunities for brands in the digital world. For cars, environmental concerns have resulted in their lustre fading, with the looming ban on petrol engines in 2030 presenting a challenge for sports cars to electrify while retaining their appeal among horsepower enthusiasts.

There is also a shift in emphasis in the luxury market, from owning beautiful and high-quality items towards something more experiential, bespoke and exclusive, according to Carlee Hardaker, head of global customer insight and customer experience strategy at Aston Martin. "It is much more about living life. People want individuality, customisation, and to share stuff on social media and portray an image of a lifestyle.
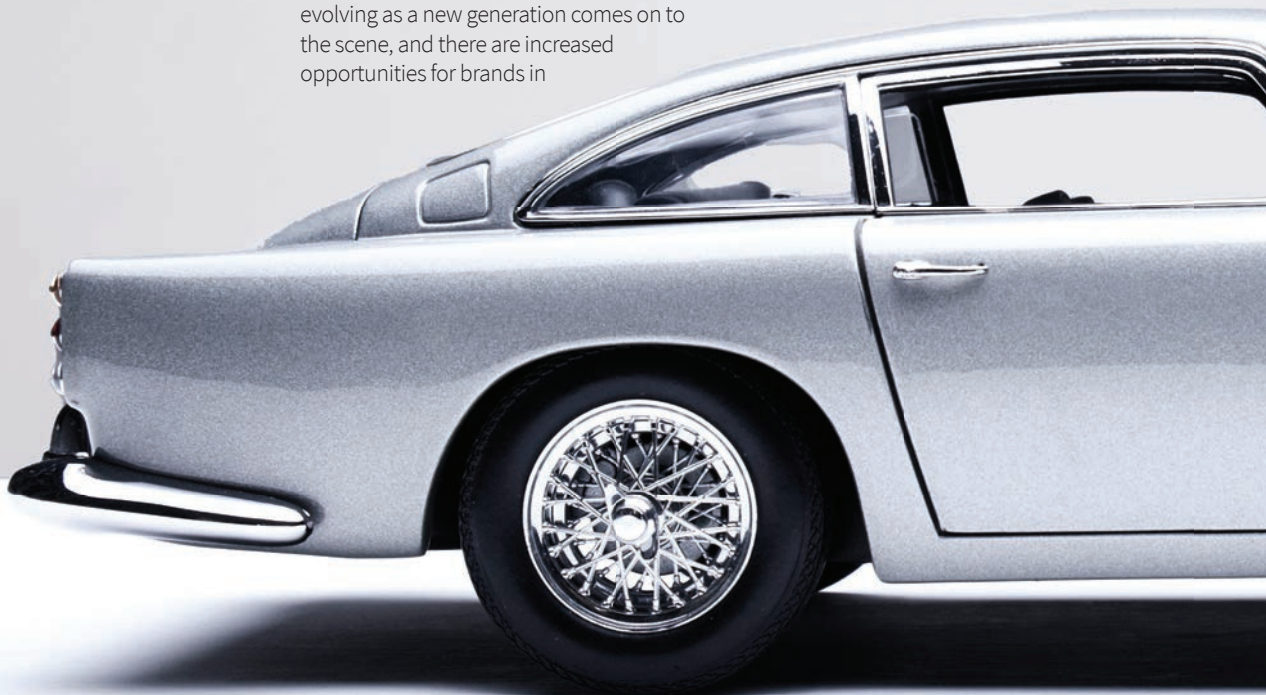
"Luxury, historically, has been a badge you wear – it signifies wealth and status. That's not the case any more; it is more about 'look where I can go, look who I can be with'. Luxury is more of an expression of your personality rather than just your status. Audiences connect with brands that represent how they want to live their life – it is not just about buying a product, it is about buying a lifestyle."

To discover more about the attitudes and behaviours of modern luxury buyers, Aston Martin teamed up with 7th Sense for a research project (see boxout, 'Richer data') involving events held with high-net-worth individuals. The results have fed into Aston Martin's brand positioning and advertising, with its recently launched 'super tourer' DB12 an attempt to combine performance and luxury more in keeping with the focus on experiences identified in the research programme. The research found that a new generation of customers wanted more from a luxury brand than just a premium product, such as experiences and bespoke items. This also means the brand is focusing more on sports, especially the F1 team.

The biggest impact of the research might be a focus on experiential opportunities for customers, according to Hardaker, with the findings underlining the importance of experiences and relationships with premium brands to a new generation of high-net-worth individuals.

Richer data

Aston Martin asked 7th Sense to explore the perception of luxury. Traditional signifiers remain – heritage, price, quality, exclusivity – but the research found that new customers want additional extras, such as technology, wellbeing, personal fulfilment, a sense of belonging, time, convenience and space.

The research consisted of several focus group-style meetings with around 50 to 60 high-net-worth individuals at a time, some of whom were existing Aston Martin customers. Participants were shown new cars and offered behind-the-scenes experiences in exchange for their opinions. "People come because it is a massively different thing to do with your day," says Fergus McVey, chief executive at 7th Sense. "You have to make the experience something they enjoy. This isn't supposed to be difficult work for them – they have better things to do, so they must get something else out of it."
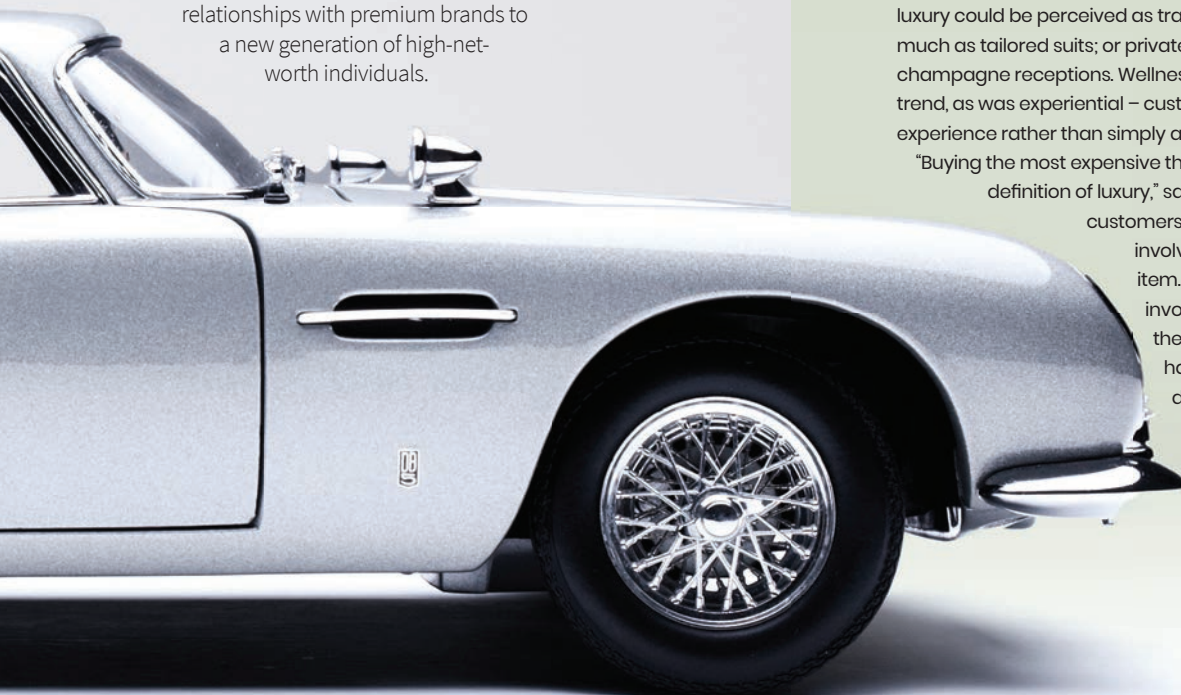
The research found eight main trends in the current luxury market. The first is a desire for sustainability, with customers wanting a product to align with their values. The next is authenticity – giving behind-the-scenes access and providing storytelling and experiences to customers. The third trend is digitalisation, with a focus on technology taking away the mundane and freeing up time, such as digital hotel keys or virtual fashion launches. There is also the idea of ultra luxury, unique to the consumer in question and beyond the realms of the everyday. The fifth element is bespoke, such as one-of-the-kind products and involving customers in the design of a luxury item.

Other trends include the casualisation of luxury – luxury could be perceived as trainers and jeans as much as tailored suits; or private gatherings over large champagne receptions. Wellness was another huge trend, as was experiential – customers want a great experience rather than simply a product to own.

"Buying the most expensive thing used to be the definition of luxury," says McVey. "Now, customers want to have involvement in creating the item. It is their feedback and involvement that creates the luxury feel - that they have been part of the discovery, design or development process."

Aston Martin has encouraged fans to interact with its cars behind the scenes

"Audiences are forever changing. I wouldn't say it is a revolution, but I think the audience is evolving," says Hardaker. "What we see as a business is that it is not just a generational shift – it is a mindset that spreads across generations. People from the age of 20 up to 80 buy our cars, and they all have a shared set of values, attitudes and behaviours, no matter what their age or demographic.

"Our customers want access – what they want is behind-the-scenes, sustainability, shared sets of values. They want time and freedom. As a company, it is really important to stay close to our customers. After all, the purchase of an Aston Martin is a very emotional decision – there are elements of rationality in it, but it is an emotional purchase.

"If we are tapping into the emotions of our customers, it is important to understand who those drivers are,

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"A customer doesn't always know what they want until they see it"
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and how we position ourselves as a brand to be relevant to new customers coming through."

This also means investing in the digital experience – both in terms of existing channels like the website and social media, and also considering emerging spaces like the metaverse.

"It is important to have digital tools to take away the mundane and make it simple and convenient, and add the level of immersion new customers are looking for," Hardaker explains, but adds: "It still remains vital to have the physical experience, as well as that digital experience."

To address this and build a rapport with customers and gather insight, Hardaker's team has run experiential events to introduce select groups of customers to new products, giving them a behind-the-scenes experience with as-yet-unreleased cars or prototypes, and then collecting feedback. This is done mostly through qualitative research, but with a dollop of quantitative for good measure.

The team has spent a lot of time talking to the people who attend these events and use a customer satisfaction programme to understand every stage of the customer journey, says Hardaker. This programme uses a range of data sources, including the business' customer relationship management database, information from its dealer network, and social media, with help from artificial intelligence and data tools.

While the customer is "at the heart of the business", Hardaker says the company has focused on letting technical experts innovate in ways that could appeal to future consumers, taking a similar approach to creativity as the likes of Apple.

"A customer doesn't always know what they want until they see it, particularly with luxury products – some of the inspiration comes from within," she explains. "It is not necessarily about testing things with our customers to see if they'll like it or asking them what they want, but using our customers as inspiration for what we develop by getting to know them in a more emotional way. Then we let the designers and engineers create."

While all Aston Martins are produced at the company's headquarters in Warwickshire, it is important to ensure it has a more global, rather than UK-focused, vision "in terms of who our customers are, the products we make and how we take those products to market".

The insights team at Aston Martin sits within the marketing and commercial function, incorporating customer insights and experience strategy, data science and analytics, and regional product planners and insight specialists focused on getting information about competitors, markets

and consumers from different regions. There is also a small innovation team.

"Even when we are talking about events, it is always fed into a central 'pot' to make sure we have a global voice of the customer," Hardaker adds. "We are very customer-centric in our approach. There is a lot of support at very high levels for understanding what our customers think, getting feedback from everything we are doing and defining who our customer is. Insight comes from so many different parts of the business."

The team carries out brand health monitoring, regular updates for the board and executive team, and calls with regional teams. There is a focus on working with smaller agencies, as a means to get a closer, more tailored relationship.

"It is important for any agency you work with to really feel part of the brand, to really know your products, as that's how you get the best insight," Hardaker says. "A lot of it is about understanding the luxury market, how to talk to and engage these people, and understanding what we want to get out of it, as a brand. We are much more inclined to use the smaller agencies that are more engaged with the brand."

With regards to new trends, there is a need to determine what fits the Aston Martin brand, and what is a passing fashion. "I don't think you ever get to your end goal if you keep changing direction within the latest fad that is coming along," Hardaker says.

"Fundamentally, are our customers really interested in it? It is important to look at it in the wider landscape of what our customers want."

Plugging in

The big challenge for Aston Martin, and the wider automotive industry, is electrification and the growing need for a more sustainable, greener world. In the UK, petrol cars are being phased out, with an end to new production by 2030. Numerous other nations have adopted similar policies of varying timescales in the past few years. With the climate emergency increasingly high on the political and public agenda, car makers have had to grapple with the shift to electric and hybrid vehicles while

retaining a more petrol-centric core audience. Aston Martin is adapting to the new realities of electric cars, but Hardaker says those changes do not necessarily mean a change in brand image.

"You still maintain the brand DNA – in some ways, whatever powers the car is irrelevant," she explains. "It is about what the brand stands for, how it feels and what it says about you. An Aston Martin is never about getting from A to B. It is not all about sound – it is about all the sensory elements.

"Our new brand positioning is about sensorial supercharge, and making sure the driving experience is consistent with Aston Martin, no matter what the propulsion of the engine or battery is."

Hardaker is referring to the company's new brand positioning, adopted in 2022 and accompanied by a global marketing campaign aimed at new audiences, which the 7th Sense research fed into.

The company has a sustainability programme called Racing Green, in tribute to the traditional colour of its cars. It aims to make the company's products more

environmentally friendly, as well as invest in people and promote the UK, with a board sustainability committee overseeing the programme's success. In 2024, Aston Martin will start delivery of the Valhalla, its first plug-in hybrid electric vehicle, with a fully electrified sports car and SUV portfolio planned for release by 2030.

Like most luxury goods, however, Aston Martins do not fit easily into the mainstream disposable culture. "We still know where more than 95% of our cars are – you can't get much more sustainable than that," Hardaker says.

"This is not a throwaway culture; this is something that stays around for life. There is an inherent level of sustainability in buying luxury goods, and the second-hand market as well.

"No business ever stands still – there are always new things coming. The challenge is staying on top of all those trends and picking out which are just fads."

While James Bonds come and go, the hope is that the Aston Martin will remain. The challenge is keeping it on the right track.

Healthy habits

Consumer healthcare company Haleon is expanding what insight means internally and externally, viewing human understanding as a competitive advantage. Leading the charge is James Sallows, who tells Katie McQuater **how the organisation is approaching this shift**

Last year, pharmaceutical company GlaxoSmithKline (GSK) spun off its consumer healthcare business – the maker of brands including Sensodyne and Panadol – to form standalone company Haleon. The new name is an amalgamation of 'hale' – an Old English word meaning 'in good health' and the name 'Leon' – associated with 'strength'.

James Sallows, global head of transformation and capability, consumer and business insights and analytics, joined the business when it was still part of GSK in early 2019, after numerous agency-side insight leadership roles at agencies including Lightspeed, Ipsos and Schlesinger. When we speak over video call in the summer, Haleon has just celebrated its first anniversary. "I've seen a real evolution between where GSK was and where Haleon is and is planning to go," he says.

Essentially, his role is looking after the transformation of the insights function and ensuring the wider business has the right capabilities to support that. "That's people, platforms and programmes – because there's no point having an ambition if we're not bringing the people and don't have the business along with us," explains Sallows.

When Haleon launched in July 2022 following the demerger, the company announced that its competitive advantage lay in its ability to combine 'deep human understanding' with science.

"That deep human understanding is insights, but it's in a much broader sense than just market research," says Sallows. "So that also allows us to broaden the field and the perception of the function, which I think is really important."

One of the first things his team did was to define what an insight is – the reason being to "get away from numbers and dashboards". Internally, he says they paraphrase "deep human understanding" as "from the 'what' to the 'why'".

"That very simple phrase allows us to bring in much broader sources of insights, but also to look across the business as to where insights can come from, and what insight is," says Sallows. "For Haleon, it is a significant priority, and publicly stated to investors, and internally, that's a culture change in terms of not just getting insights and data from consumers, but actually just inviting voices into the business, whoever they may be."

How has that changed the way in which the insights function works with other teams? For one thing, there is a 'broader understanding' of what insight does, according to Sallows. He cites the example of an all-company broadcast he and his team ran on how to upskill

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"There's no point having an ambition if we're not bringing the people and don't have the business along with us"
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colleagues in human understanding that he says had the highest spontaneous uptake of any global comms broadcast. "That was people coming on to understand how, in [their role] they should they be leveraging insights or working more closely with insights."

The team also experiences more incoming requests to partner, and works 'with better interconnectivity' across the business, according to Sallows – that might be, for example, working with the customer relations teams to bring in more insights from incoming queries.

There are also more subtle signs of how things have changed. The company's latest financial results, published in August and reporting organic growth of 10.4% for the first six months of the year, include several mentions of 'deep human understanding'.

Sallows feels that the shift really started after the function set out its aims a few years ago, before the spin-off. "We were kind of already on this path. So, when the business opened the doors and said, 'OK, deep human understanding. What is it?' we were ready to seize that and say, 'We can help. And we can help define that from within our function outwards'."

Working with teams across the business such as procurement, finance, quality and supply chain and human resources, Sallows has been trying to understand how insight techniques can be used internally to impact business performance – a shift from focusing insights squarely externally on consumers and market opportunities.

Perhaps the clearest example of this approach to insight is the mini MBA (Master of Business Administration) in deep human understanding, launched at the start of 2023, which is available to all employees globally. Sallows' team started working with University College London in early 2022 to develop the course, and there are currently 2,000 employees studying for it – "almost none of them are in insights", Sallows adds.

The course consists of nine modules covering areas including storytelling, semiotics, behavioural science and macro trends, and ends with students writing a capstone project about how insights could benefit their field of work within the business.

Reading this "groundwork of really interesting kick-starter projects" has been "absolutely fascinating", says Sallows. They include ideas like how to increase diversity in the workforce, how to use behavioural science to look at employee engagement and how to leverage insight to drive efficiency in supply chains.

When the team established the course, they acknowledged they faced a barrier to take-up – of people thinking it wasn't for them. So they went quiet internally.

"When we launched it, we did zero communication from our function. We did not go out to the business and say, 'We've developed this thing'. We went to

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"The pay-off is not the project, but the halo impact of the project"

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functional heads in all other areas of the business, and got them to tell us why they think deep human understanding is important for them, and used them as the mouthpieces to the rest of the business. We build it, we curate it, we run the programme – but internally, we don't actually talk about it ourselves very often."

Understanding new spaces

In a competitive market, research is helping Haleon to understand more about whether a drive towards self-care and other changes in people's behaviour towards their health during the pandemic have stuck, or reverted back to pre-Covid behaviours.

The company is also carrying out a lot of work in demand spaces – areas of untapped opportunity beyond its current products.

Sallow says: "People don't look at their health through the lens of a condition, which is how a healthcare business [typically] looks at health. If you suffer

from back pain, for example, you're not defined by that back pain as in which molecule and which strength you're going to take. It's more about what's the impact on your quality of life and the impact on those around you."

On that note, the team has carried out research work focused on understanding the carers of pain sufferers – while not the target consumer, they have their own specific set of needs and challenges.

Haleon is also partnering with non-profit organisation The Human Library to bring the voices of people who have historically suffered prejudice into the business to speak to senior leaders. In addition to helping it understand where the demand space is, and that some growth spaces may lie beyond the traditional view of the businesss, the scheme led to the business taking away nine key actions to be a better partner and ally, according to Sallows.

For some of the company's bigger strategic questions, it has seen challenges in terms of working with insights suppliers, for example, because it might be working on insight briefs at a much earlier stage, and agencies can struggle with that. "In some cases, we're trying to be more forward-looking and more – maybe – progressive. Sometimes we struggle with some insights suppliers to see that," explains Sallows.

"There are exceptions, but we do see a real resistance, and we do find some agencies say to us, 'Come back to us when you have the brief fully-formed', because they don't want to participate in the refining of the questions. There are other agencies now that understand probably a bit more about the way we're going, and that will work with us on that refining."

Research can be considered differently from a financial perspective, as not just the project, but what Sallows calls a 'halo impact' of the work after it is delivered. From an internal perspective, the company now produces insights cards for a central repository that are used to integrate insights within the business and add value beyond the life of a project – and asks the same of its suppliers.

"This is a personal belief of mine: there

is a way to look at research as to its ongoing impact beyond the delivery. You can consider that the pay-off is not the project, but the halo impact of the project post-delivery. So I think we're too focused on, 'It's been dropped, it's been presented, we're off'.

"I got a really interesting brief response from an agency recently, where they actually built into my brief ongoing stakeholder engagement, and fostering support. I thought what was interesting was that they'd understood that we didn't want them to drop and run."

Securing skills
Paraffin and Ipsos are Haleon's partners for most of its insights capability work, and the company has worked with Paraffin on developing engaging learning approaches – one example being an immersive remote quiz hosted on Teams, soundtracked by David Bowie.

Haleon has also built a career programme solely aimed at insights professionals and focusing on how to create progression – whether people want to become a subject matter expert or a leader and manager. The initiative offers up to 15 individuals a year access to coaching and mentoring, among other things.

Sallow says: "One of the big challenges of insights is we say, 'We want you all to be strategic planners, or strategic partners', but if you look across an insights function, there is a high percentage of people who are more introverted and more focused on facts, logic and data, because it's the nature of our role. You can't just say to those people, with a click of the fingers, 'become a manager, become a strategic partner' – and for some people it's not the right answer. So, what we've been looking at is how do you enable an insight career that doesn't require you to have to become a manager? And if you're looking for a career progression, what do you need to be working on to build?

"You can have an ambition for the future of insights but the people who work in insights have worked in insights in a particular way, and have a particular mindset and a particular skill set. It's like AI – you can't just expect people overnight to become experts unless you invest in it."

Beyond the insights function, there is now a mandatory insight section in every interview for any role across the business globally – but that aside, has all of this changed how the company recruits within research?

Yes, says Sallows. Not only does it now want deep specialists, it also wants broader generalists who can carry out strategic planning or stakeholder management. But there can be a gap between the ambition for insights and bringing the function along.

"A traditional insights function, over the years, can easily have been diminished through producing the numbers, producing the dashboards, reporting to stakeholders, kind of being a back-office function," says Sallows.

"When you set an ambition of: 'We want to be a consumer-centric business,' that gap can be significant. So we're looking in both areas.

"Both the way we recruit and the way that we develop people has changed in the past couple of years, and that's accelerated with the launch of Haleon."

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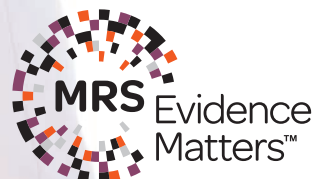
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How to turn acorns into oak trees

Want to advise on building a business? Want to turn acorns into oak trees? Want to stack the odds in your favour?

Take these seven guiding principles – or pillars of wisdom – and adhere to them with zeal.

1) Back proven entrepreneurs

Back those who have done it before, who have built a business from scratch and who know the trials and the tribulations, the agony and the ecstasy. They know what the stock market expects of them – the rules of engagement – and have an existing fan base of investors who made good returns from them in the past and will back them again.

2) Real skin in the game

The chosen entrepreneurs must have real skin in the game; they must risk their own capital and not just play with other people's money, otherwise known as 'opium'. Ideally, they should hold up to 20% of the equity, but no more, so they don't develop imperialistic tendencies.

Too much control is almost as bad as not enough. They must be totally committed, not just involved. Think of bacon and eggs: the chicken is involved, but the pig is committed. We're after the pig. A sizeable shareholding does not, of course, guarantee that things will never go wrong, as invariably they do, but it ensures that the entrepreneur leaves no stone unturned in their quest to fix things.

3) Relationships really matter

Back only those you know, like and trust. People buy people. Don't waste time pitching for new business from management teams you don't know and where you have probably only been invited to make up the numbers and to give away your best ideas and valuable time for nothing. Instead, rely on good old business to win you good new business. Reputation is all. It is priceless. It cannot be bought; it must be earned – the long way, the hard way, by doing the right thing every time, all the time. No shortcuts.

4) Invest in businesses you understand

Only invest in businesses you understand. If you don't understand a business, you won't be able to value it – and, if you can't value it, you can't raise the funds to grow it. Price discovery is the key, and understanding the business model and how it generates cash unlocks it.

5) Go where the growth is

Back businesses in growth areas with structural tailwinds to which investors will, in turn, be interested in allocating capital. Avoid talk of land grabs and TAMs (total addressable markets) at the expense of profits. With free money gone and higher interest rates here to stay, there is no point in backing a business based on future vision, global domination and other gobbledygook. Go for cash generation and the here and now.

> "Profit with purpose has been at the heart of every decent, long-lasting business built since time immemorial"

6) Stick to your knitting

Back businesses that obsessively focus on growing the top line and controlling the costs to ensure a healthy bottom line and a sustainable dividend stream. The best investment is one that pays a progressive dividend twice a year. Don't over-concentrate on ESG (environmental, social and governance) and DEI (diversity, equity and inclusion) issues at the expense of the core. Profit with purpose has been at the heart of every decent, long-lasting business built since time immemorial.

Look after your employees properly and they will look after your customers, which, in turn, will produce good returns for your shareholders.

7) Don't underestimate cultural differences

The further you go, the riskier it gets. People underestimate cultural differences and assume that if something works in the UK it will work in Europe and work in the US, where they speak the same language.

Wrong. Conquer your own backyard first and then, only then, look for opportunities further afield.

Meanwhile, be obsessive or be average.

Executive decision

A lack of consistent standards is hampering CEO decision-making and generative AI is already impacting the calls leaders make, research from IBM has found. Katie McQuater **reports**

Uncertainty places greater pressure on leaders. Chief executives must steer organisations, balance shareholder priorities, and pinpoint growth and weakness, all while navigating a changing environment. Uneasy lies the head that wears the crown – particularly when it also needs to weigh up large-scale challenges such as sustainability.

New research from IBM has explored the factors leaders take into account when making decisions. For 20 years, the firm's Institute for Business Value (IBV) has been conducting interviews to explore demands on senior leaders and how the various roles within the c-suite are changing. For this year's annual CEO study, *CEO decision-making in the age of AI*, IBM and Oxford Economics interviewed 3,000 CEOs and public sector leaders about their key decisions and processes, and what they think matters most now.

"We're trying to make it a conversation over time," says Haynes Cooney, research director at the IBV. "How are CEOs thinking about all these different challenges, particularly in this seemingly more unpredictable, uncertain time?

"Ten years ago, CEOs were more able to resort to financial and operational metrics to explain decisions and to measure themselves as organisations. If there were other externalities, that was fine, but their focus was on delivering shareholder value. That certainly has evolved as a conversation."

Most CEOs interviewed for the research predominantly use operational and financial data to make decisions, but the majority also reported that the most important decisions cannot be made based on data alone: almost two-thirds said they turn to input from staff, and more than half stated that they include their own personal experience and intuition. The study also investigated a group of financially high-performing CEOs, finding that they were more than twice as likely as their peers (65% vs 28%) to strongly agree that metrics are driving organisational behaviours. They also reported that metrics give them a full understanding of their organisation's performance and health.

Seeking standards

While received wisdom tells us leaders are awash with data, IBM's research has found executives grappling with a lack of universal metrics and standards. One of the key challenges leaders highlighted in last year's study, which focused on environmental sustainability, was a dearth of complete information around the issue. When IBM spoke to clients about the results, they were struggling with uncertainty over what to measure, what the standards are, what the payback period should be, and to which stakeholders they should pay most attention, says Cooney.

Yet the issue isn't confined to sustainability, nor was it isolated to the 2022 study. Across this year's research, 61% of CEOs said they lack consistent standards in one or more area of strategic focus, and 56% reported that they are delaying at least one major investment pending greater clarity on standards and regulation.

"Stakeholders are demanding more transparency and justification of why and how decisions are being made, even as areas in which they are asking for those decisions to be made are perhaps less clear and less data-driven all the time," says Cooney.

This year's study found, for example, that fewer than half of CEOs feel that they have the information necessary to respond to stakeholder demands for transparency around issues such as data security and privacy.

Generating disruption

There is also tension between a lack of standards and the desire to innovate. As IBM was preparing for this year's report, generative artificial intelligence (AI) piqued the interest of businesses in every sector, offering the researchers an opportunity to use it as a case study in how CEOs are making decisions about major disruptions.

The research highlighted a gap between leaders' ambitions for how AI could be used and how it could drive competitive advantage, and what is realistic for their organisation in terms of skills or responsibility. More than two-thirds (69%) of CEOs surveyed see broad benefits of generative AI, but only 29% of their executive teams feel they have the in-house expertise to adopt it. Cooney says: "We see a tension between the CEO as a changemaker, visionary, and

chaser of opportunities, and other folks playing other roles around the c-suite table." Additionally, 43% of CEOs reported that they are using generative AI to inform strategic decisions – however, fewer than one in three leaders has conducted an assessment of the potential impact of it on their workforce. Despite this, 57% are concerned about the security of data and 48% are concerned about bias or data accuracy.

"Even though CEOs are very optimistic and see a lot of value, they're not myopic and they know that there are a lot of risks," says Cooney. "There's quite a conversation happening right now around how you seize opportunities and, to a large extent, first-mover advantages in a world where you also have significant consequences, and everyone is just waiting for the first company to have a massive breach as a result of generative AI."

So, how do businesses balance that trade-off? "It makes for really interesting client conversations," says Cooney. "Using proprietary data generates business value, but using it in generative AI amplifies all the risks you know are there."

There is an inflection point when experimentation ends, and Cooney adds: "When we ask c-suite executives where the tipping point is between piloting and experimenting, and operationalising, around 25-30% feel like they are operationalising something, and that will flip in the next couple of years."

How leaders can prioritise decision-making

Among the recommendations from the IBM report *CEO decision-making in the age of AI* are the following:

- Eliminate layers between the data source and the decision-maker
- Guide decision-making across the organisation, setting a framework for how decisions are made and how information about those decisions flows
- Consider elevating those who can bring together a technology strategy and a business strategy
- Assess the potential impact of generative AI on your workforce, and act with a clear view of how to help your workforce with the disruption and transitions AI will bring
- Change the mindset from 'adding AI' to 'starting with AI'. Start conversations with teams about the use of AI to remove roadblocks to progress and to ensure safety measures are in place
- Promote responsible AI in ways that align with the values and standards of the organisation.

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Learning on the job

In 2019, I wrote about the data lake, and in between my usual rants about unnecessary jargon (I hate the term 'data lake'), I gave some advice on how to navigate big datasets. One of those pieces of advice was to 'paddle with a purpose' – that is, know what you're doing and what your objectives are, and stay true to them.

Now, I'm not a big fan of contradicting myself, and I will argue that what I'm about to say here isn't contradictory, but I can see why some people might think that. Bear with me.

What I'm talking about here is the importance of not knowing what you're doing; how much you can learn from being lost and, arguably, a bit overwhelmed if you just allow yourself to lean into it.

I'm still not talking about blindly poking about in a dataset, hoping something interesting will catch your eye. I'm not talking about ignoring those critical business objectives, which I believe should remain front and centre throughout the entire process. I'm talking about getting a bit experimental – pushing yourself out of your comfort zone.

One of my most influential managers introduced me to the idea of a 'shiny list': a safe place you can keep those ideas, methodologies, case studies and technologies that make you sit up and go "oh that's interesting, I'd like to give that a go".

When you pick something up from your shiny list, chances are you won't have much of a clue about what you're doing. You'll need to work it out as you go along. I normally start with some research (no surprises there), maybe some academic papers, other case studies, or other people in the industry or in my team who I can bounce ideas off. Then I roll up my sleeves, take a big breath, and dive into the unknown (pun intended).

Sometimes I'll pick up a dataset from the internet that I don't have a clue about and play with it. Sometimes I'll revisit an old dataset from a previous client or project. In these cases, it's

great – you can run this additional work alongside your day job. In my opinion, however, the magic happens when you do it on a real-life, in-the-moment project.

I had this exact situation happen recently. I was having a great chat with a client about how to go about a data-led task that seemed a bit difficult. I was totally honest with them: yes, in my mind, I have a fail-safe (as much as anything can be fail-safe) method to use, that I've used before, that I know will get us to an adequate solution.

I don't know how much you know me, but I'm generally not a play-it-safe kind of girl. Safe doesn't get you exceptional. It doesn't get your clients astounded – and it doesn't get me excited or passionate about what I'm doing. Adequate is never what I'm striving for.

> **"Safe doesn't get you exceptional. It doesn't get your clients astounded... adequate is never what I'm striving for"**

So, alongside this safety net of a method I know will work, I have a few ideas for new things I can try. Things I can pluck from my shiny list. People I know I can talk to about doing things slightly differently. Ideas that I know will get me excited – will have me staying in the shower for too long as I'm getting lost in my thoughts (apologies, United Utilities).

Playing about with these additional methods on a live project means we can test, learn and compare methods in real time. It means we can discuss the pros and cons of each avenue with the client as we go. We're also using a real-life dataset, not a toy one that's beautifully void of blanks and NAs and 0s and speeders and fake AI bots, and everything else you get nowadays.

It means I learn something, while being excited about what I'm doing. It means the client potentially gets something better than they were expecting and I get to dust off that part of me that loves not having a clue what she's doing. Don't underestimate that part of you – that part that doesn't know 100% what they're doing, and actually really enjoys it.

What's in a **name?**

Television adverts are more successful if they show the product first and brand name later, according to research examining which creative factors are most likely to be effective.
Liam Kay-McClean **reports**

Advertising, depending on who you speak to, can be seen as an art or a science. On the one hand, it is intended to stir emotions, draw in consumers and maintain a loyal fanbase. On the other, there is the need to generate repeated sales, encourage unconscious purchasing decisions and appeal to behavioural traits.

One recent study, led by researchers from the University of Otago in New Zealand and Ehrenberg-Bass Institute for Marketing Science in Australia, sought to examine how advertising could be made more effective, and the factors affecting its likelihood of success. The resulting paper, *Finding creative drivers of advertising effectiveness with modern data analysis*, makes several suggestions for improving advertising effectiveness and the means by which researchers analyse campaigns.

The research set out to address two issues with previous studies of advertising effectiveness, the first being the way that the relationships between creative variables and various advertising outcomes had been determined – often using ordinary least squares or logistic regression models. The models assume that the 'effect of explanatory variables is independent of the effect of other variables', according to the paper.

The second issue is that most studies on advertising effectiveness lack replication of analysis, as 'they apply a single analytical method and do not use a hold-out or alternative data set for validation'. This means that an alternative methodology or algorithm could lead to the results of an experiment not being replicated, according to the authors.

To address this, the research team applied a modern data analysis paradigm to a data set originally reported by Hartnett, Kennedy *et al* (2016) that examined creative variables from 312 television

advertisements against their short-term sales using an ordinal logistic regression model. The data for the 2016 study was provided by a consumer packaged goods company, and the adverts were aired and measured in five developed markets for more than 60 brands. The advertisements were accompanied by a commercially validated measure of sales effectiveness using single-source data.

In the 2023 research, researchers re-analysed the same ads using traditional, artificial intelligence and machine-learning models, to identify which creative variables contributed the most to sales performance.

John Williams, director of the Bachelor of entrepreneurship at the University of Otago and one of the report authors, says it was important to use a variety of methods in the research. "Every statistical method, model or algorithm has pros and cons, and assumptions that are often not met in practice and where the impact of those assumptions being violated are rarely known and difficult or impossible to quantify. If we use several methods equally and they all give the same results, then we have more
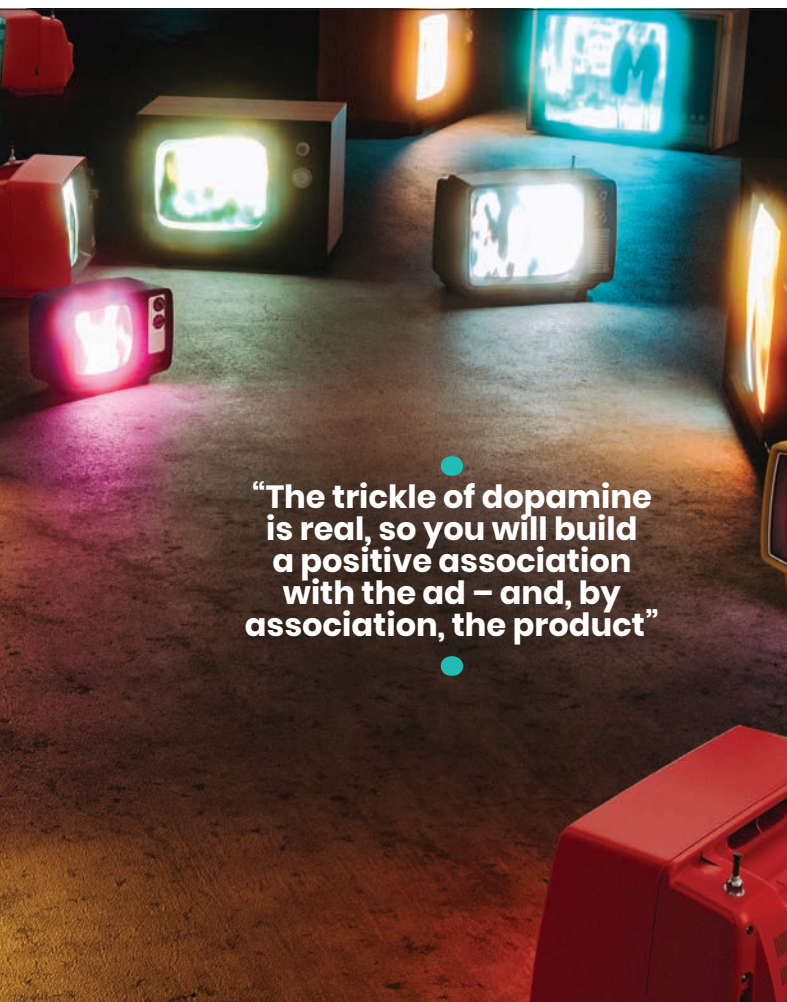
"The trickle of dopamine is real, so you will build a positive association with the ad – and, by association, the product"

confidence that our results are an artefact of the data and not the method."

The research made several findings – firstly, that advertising must strike a balance between branding and creative elements. Creative tactics, such as humour or character-driven narrative, are important for drawing attention to advertising; however, executing branding effectively is necessary to help ads build useful memory associations and increase likelihood of a successful purchase.

Early product introduction was linked to improved sales, according to the research, as was later brand name introduction. The study found that it is possible to show the actual product and its use without the brand name overtly present.

"The most surprising finding was not to lead with the brand name," says Williams. "This, according to my colleagues who are experts in advertising effectiveness, runs counter to accepted wisdom."

The research found that shorter branding duration positively affects sales, adding that it complements a later introduction of a brand name. The later

introduction meant there was less chance of overexposing a brand's name in a campaign.

The study also found that time spent showing the brand does not always compensate for how the brand is integrated as part of the creative narrative, or how brand name recognition is more important for brands that lack awareness and familiarity.

"If you see an ad for a product that leads with the brand – and if the ad is for a brand you don't use – you will probably cease paying attention, because you think it's not relevant to you; you already have a solution to that problem," explains Williams.

"If the ad is for a brand that you do use, you will probably cease paying attention because you are already 'sold' on that brand. Why watch an ad telling you to do something you do already?

"In contrast, if you see an ad and you don't know what brand it's for, your pre-emptive cognitive filters will not engage. You will keep paying attention, perhaps even experiencing a sense of mystery and unresolved tension, until you find out what the ad is about. Then, when it is revealed, that release of tension produces a tiny trickle of dopamine.

"Even though the tension-and-release process is subconscious, the trickle of dopamine is real, so you will build a positive association with the ad – and, by association, the product."

The implication of this research for advertisers is that they can probably generate new insights by applying multiple models to their advertising data, increasing the breadth of creative variables at their disposal to improve creative effectiveness. Marketers should open a discussion with their advertising agencies about these creative variables, which present greater odds for success, and for how the product and brand are incorporated.

What is the biggest lesson from this research for market research businesses focusing on advertising effectiveness? Where possible, do advertising testing with a commercially relevant dependent variable: sales success, as opposed to liking or recalling an advertisement, according to Williams, who adds: "It's easy for the typical data scientist working in an ad agency to apply our paradigm. A few years ago, it would be tedious manual work; with modern software, that manual work can be automated away."

● *Finding creative drivers of advertising effectiveness with modern data analysis,* **John Williams, Nicole Hartnett and Giang Trinh, International Journal of Market Research** *2023, Vol. 65(4) 423–447*, **was awarded Silver Medal for best paper published by the IJMR, at the MRS Excellence Awards 2023.**

Eyes wide open

I have written previously about the need to use behavioural science carefully; to not abuse its power to influence behaviour. But now the darker side of behavioural science – the world of dark patterns and sludge – is becoming increasingly sophisticated and we need to work harder, as researchers, to identify and call out these dark patterns.

Thirteen years ago, user experience (UX) consultant Harry Brignull sat at his kitchen table to collect examples of what he called 'dark patterns' – deceptive or manipulative online techniques that create such levels of friction that it obstructs our best efforts to do something that's in our interest, such as cancelling an unneeded subscription, making a payment, completing an application form, or selecting a product or service that best meets our needs.

Dark patterns, also known as sludge, are increasingly common. EU researchers recently found that 40% of 399 websites they surveyed contained manipulative practices – from fake countdown timers to 'pressure sell' and hidden information, to directing consumers to suboptimal choices. It's everywhere.

Not only is it more ubiquitous, but it is evolving rapidly and becoming more sophisticated. Better metrics, easier tracking and the ability to do A/B testing have all meant organisations can more easily apply and test dark patterns. Technology is always developing, which allows the more unscrupulous to leverage dark patterns through creative UX design or even more invasive tracking. With more and more of our lives online, we are exposed to it constantly.

The widening and deepening impacts of sludge

Sludge isn't always intentional. Sometimes, a product or service provider might genuinely believe they are offering something in a way that matches consumer needs. Other times, there might be unintentional friction caused by poor design or clunky technology that makes a consumer journey more difficult than it needs to be.

The effects on the consumer are the same, however, and can include physical impacts – such as loss of time and money, as well as being saddled with suboptimal products and services – and psychological impacts, such as frustration, anger, and even shame.

> ● **"The effects on the consumer can include psychological impacts, such as frustration, anger, and even shame"** ●

Many consumers are increasingly vulnerable, given the cost-of-living crisis. They are desperate for deals and value, and financial stress may lead to poor judgement and choices.

There are new types of dark patterns and sludge: some apply existing techniques to new online contexts – for example, in voice assistants and smart devices such as smart TVs and speakers; others leverage existing techniques, such as pressure selling, in new ways.

Research by Johanna Gunawan and her colleagues, published this year, on smart devices or the 'internet of things', analysed 57 different smart devices – such as thermostats, doorbells, fridges, TVs and speakers – and found that the average device had 20 instances of dark patterns; most had at least three. One smart TV had 60! One driver of so many dark patterns was the limited interfaces of the devices – meaning a user might have little control over what they could control.

Pressure-selling techniques that leverage feelings of scarcity and urgency have become ubiquitous, but new types are evolving to catch consumers out. We are all used to being told there is 'only one left' to encourage us to buy – but how would you react if you received an email, supposedly from a chief executive, telling you that stock of a product you recently browsed was 'running low' and no more was expected in, so you might be wise to purchase now?

We are also seeing upselling techniques that try to steer us into buying a more lucrative version of a product or service. For example, while monthly subscriptions to products and services have become ubiquitous, defaulting the consumer to a subscription rather than a one-time purchase could be deemed manipulative – and even deceptive. Large and small online retailers fall foul of this. When combined with one-click ordering, there is also a danger that consumers might purchase a subscription without realising. Additionally, there have been cases where a premium version of a service has been added to the consumer's basket automatically, or by default. We have seen this for cross-channel ferry bookings.

Who is steering?

Researchers are also becoming concerned about 'hypernudging' – a predictive, dynamic system of nudges in an online environment. They

change in response to feedback from consumers, adapting in real time, and can be predictive by using a consumer's data. Sometimes, it can be useful for consumers; but it can also be harmful, particularly as artificial intelligence becomes more common.

Viktorija Morozovaite, postdoctoral researcher in competition law at Utrecht University, wrote in her 2021 paper *Two sides of the digital advertising coin: putting hypernudging into perspective*: "The aim [of hypernudging] is to reach the right user, with the right message, by the right means, at the right time, as many times as needed. This process may be visualised as a staircase: it is no longer about a single step placed by the choice architect to steer the user, but multiple steps that might come in different shapes, at different times, all with the goal to gently push them towards a specific outcome."

For example, voice assistants can steer our purchasing by ordering from a predetermined preferred provider, framing a preferred product to match a consumer's preferences, or even adjusting recommendations depending on a consumer's mood. While this could be beneficial – and even perceived as useful – it can alter perception of the choices available, and may not steer people to the best price or quality choice.

Keeping sludge at bay

Regulators play an essential role in consumer protection. In the UK, the Competition and Markets Authority has recently cracked down on false countdown timers for pressure selling and false scarcity messaging. There is also a duty on organisations to 'self-police'. Some, particularly in the financial sector, are conducting their own

'sludge audits'. In Australia, the New South Wales Behavioural Insights Unit has produced its own guide to reducing sludge in government websites – simple tools and checks that will make the consumer journey smoother. Whether researcher, regulator, company or government, they are all using behavioural science as their detective lens to identify and call out these practices.

As researchers, we are in the perfect position to identify dark patterns and sludge – intentional and unintentional. We hear those agonising accounts of consumer experience first hand; we are often auditing the online consumer journey and can spot those bottlenecks and moments of pure friction. Arming ourselves to use behavioural science as a lens or a powerful tool to analyse sludge and show why it is harmful or unfair, we can demonstrate how consumer decision-making can be so easily steered and influenced.

Whether the sludge is intentional or unintentional, all consumer-facing companies would be wise to carry out audits of their consumer journey or processes, to identify and remove sludge – to act as behavioural detectives.

Implications

- Dark patterns and sludge are becoming more sophisticated as more of our lives are online and as technology rapidly advances
- Behavioural science is an essential lens to identify and illustrate why these techniques are harmful to consumers
- Researchers and consumer-facing companies can carry out audits of consumer journeys to identify and remove sludge.

Keeping up with the Code

For more than 60 years, the MRS Code of Conduct has been the foundation of good research. We clearly and fairly set out the professional standards that all research practitioners must maintain.

The MRS Code of Conduct is crucial in helping to protect and regulate first-rate research, insight and data practice. MRS is committed to keeping the Code under regular review to ensure it is fit for purpose.

This year, revisions have been made to the Code (which was last updated in 2019) to reflect evolving ethical best practice. The changes focus on: the scope of the Code; clarification of Member and Company Partner obligations regarding cooperating with MRS in investigations; participant wellbeing; and reporting obligations in the context of inclusive data.

About the MRS Code of Conduct

The Code, the Regulations and the associated disciplinary procedures – supported by a suite of guidance documents – apply to all individual members, accredited Company Partners and those retained by them.

Historically, the Code was created to support those engaged in research and insight in maintaining professional standards. It covered practitioners' activities, from inception to design and from execution to use of data in research activities.

In recognition of the growth of activities by practitioners beyond research, the Code was expanded to cover all professional activities undertaken by members and Company Partners.

Our members have commissioned and provided evidence that has helped win elections, launch global brands, and understand profound trends in society. We support, promote and aim to enrich the research and business worlds.

In consultation with its individual Members and Company Partners, MRS supports best practice by setting and enforcing industry standards. The commitment to uphold the MRS Code of Conduct is supported by a wide range of specialist guidelines.

All MRS Members must comply with the Code. It applies to all Members, Company Partners and those retained by them.

MRS Company Partner organisations are required to take action to ensure that all individuals employed or engaged by them (whether MRS Members or not) comply with the Code as if they are Members. It applies to all Members irrespective of the sector or methodologies used.

The Code is also intended to reassure the public and other interested parties that activities undertaken by Members and Company Partners are carried out in a professional and ethical manner. Here, I outline how the Code has changed.

Clarification of Member and Company Partner obligations

Members and Company Partners must ensure that contracts and non-disclosure agreements with clients, suppliers, third parties or participants do not compromise adherence to the Code and the obligation to assist if a complaint is raised.

Failure to comply with the spirit of this provision may inhibit and/or prejudice an investigation to the detriment of the complainant, the MRS Member and/or Company Partner, and such failure may be considered to bring discredit on the profession, MRS or its Members, in breach of Rule 8 of this Code of Conduct. To be Code-compliant, Members and Company Partners must also ensure cooperation with MRS to assist in the early resolution of any complaints.

Scope of the Code

Since 2019, the Code has been expanded to cover all professional activities undertaken by MRS Members and Company Partners. The scope of the Code now places a stronger emphasis on research, insight and data analytics best practice.

To be Code-compliant, Members and Company Partners must:
● Ensure that participants are clearly informed about the purpose of the data-collection activity
● Ensure that personal data is not used for any purpose other than that agreed by participants
● Ensure adherence to all relevant specific legal and ethical requirements if undertaking direct-marketing activities.

Participant wellbeing

The Code has an increased focus on participant wellbeing, including providing information to support and assist as appropriate.

It is important to assess whether a participant is in a vulnerable

position and how to conduct research in such a manner as to reduce the likelihood of causing harm or adverse effects.

If the research is on a sensitive topic, or it is known or likely that some or all of the participants are potentially vulnerable, support materials or helpline numbers may be provided to participants.

To be Code-compliant, Members and Company Partners must:

● Ensure clarity about the precise focus of their research and the information they require
● Ensure any probing of participants' personal experiences is done with extreme care and sensitivity
● Ensure that any support materials offered to participants do not double as seeking donations.

Representative samples

The Code now has clarity on reporting obligations in the context of inclusive data, which includes reporting sampling characteristics and parameters used when defining samples as representative of segments of the population – such as when reporting nationally

> **"The Code has an increased focus on participant wellbeing, including providing information to support and assist as appropriate"**

representative ('nat rep') or city representative ('city rep') samples. The MRS best practice recommendation is that for research and data collection to be inclusive of the population, all relevant personal characteristics should be included. This ensures that all participants are equally valued, and their opinions and attitudes are being gathered and represented.

Practitioners can also use this guidance to assess whether they are complying with the Code in collecting demographic information for these areas, including for the purposes of 'nat rep' samples.

The new Code of Conduct applies to all MRS Members and MRS Company Partners as of 14 August 2023. Resources to assist Members and Company Partners with the key changes to the Code, including live and recorded webinars, are available on the MRS website: **mrs.org.uk**.

● Any questions concerning the revised Code should be directed to MRS Codeline: **codeline@mrs.org.uk.**
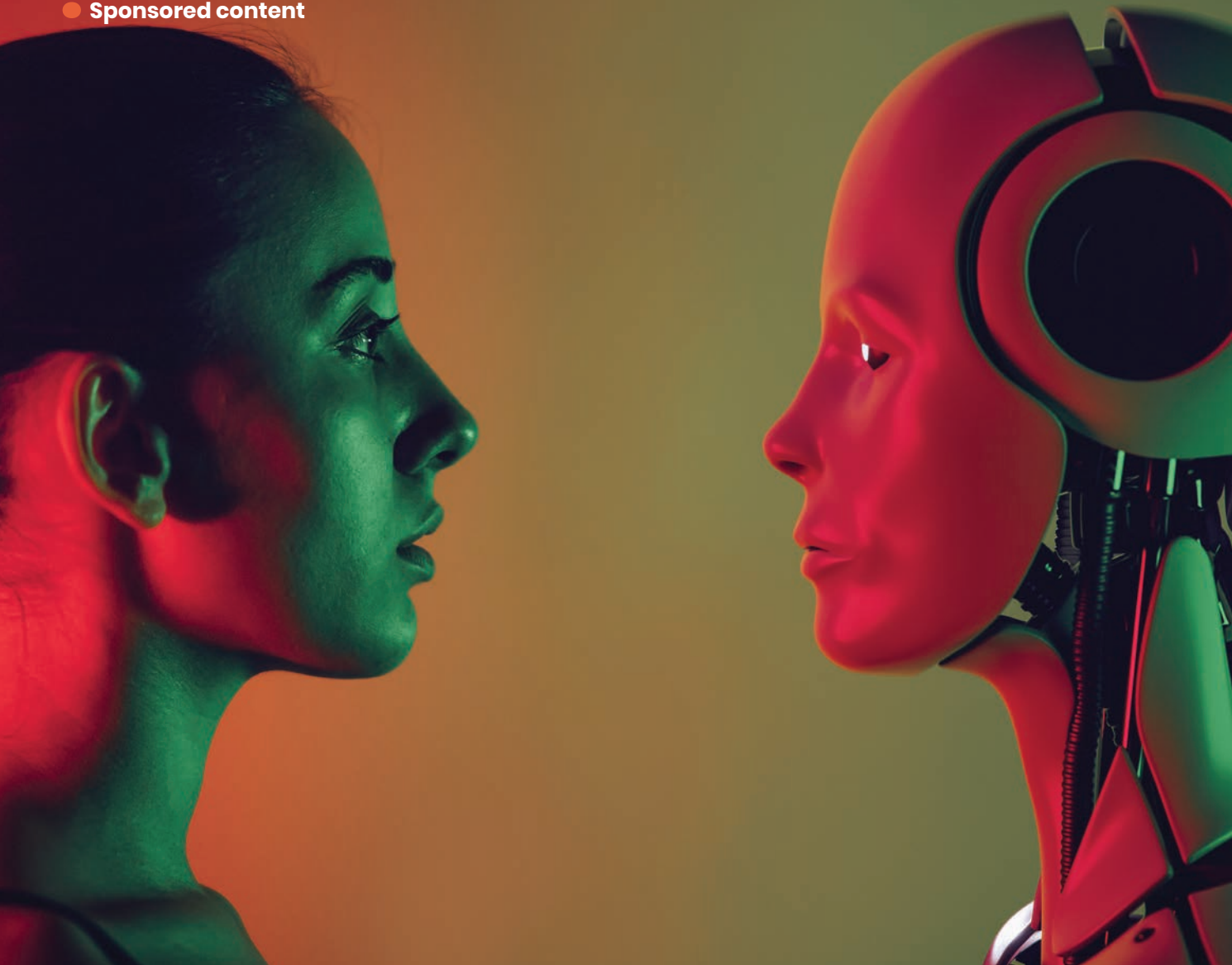
Combating fraud

Data quality will differentiate agencies and suppliers. By Judith Staig

Declining data quality in online research is the industry's worst-kept secret. Most researchers are aware that it is increasingly difficult to ensure data quality, with the central question being: "When you recruit somebody, how do you know who they really are, whether they have answered honestly, or that they are even human at all?"

This goes beyond problems that are easy to fix, such as removing speeders and flatliners – people rushing through surveys without really considering the answers. More complex and insidious issues include automated bots set up to answer surveys at scale and professional respondents – people who understand how surveys work and want to game the system.

Simon Glanville, managing director at Ronin, says: "We are getting hit with individuals trying to access a study multiple times, break encrypted links, or set up an automated response. We have had instances of all

of these and been able to identify them, but we can't be complacent."

Don't ask, don't tell

From the perspective of respondents, it's being driven by incentives. The pennies offered in online quant surveys become more attractive when you can fill out a survey multiple times by breaking encrypted links or by using automation. And the sometimes hundreds of pounds on offer for qualitative research with people in sectors such as finance or healthcare can encourage respondents to cheat. In business-to-business (B2B), it's possible to check up on people via social media profiles or telephone checks. However, the problem is harder with business-to-consumer access panels, often because there are long chains of suppliers involved in providing the sample; this is not always transparent.

Glanville agrees that sample provenance is important. "For consumer, I could go out this morning and buy 1,000 interviews at about 70p per interview," he says. "But I know that, when I look at the output, I would have to remove 70-80% of the data. That is a terrible state of affairs – and if you are removing that much data, you can't even believe the 20% you are left with. It should almost come with a health warning."

We can't just blame respondents. We need to recognise how the industry has contributed to the problem. There is so much pressure on turnaround times and budgets that, if a supplier offers feasibility at the right price, it can be tempting not to ask too many questions about the source.

Additionally, younger researchers who weren't trained in the days of widespread telephone research and paper-based table checking don't necessarily have the experience of quality control, or the skills needed to spot data issues. Glanville says: "As an industry, we have missed the boat, collectively, in not imposing the kind of rigorous quality-control checks we had with telephone research on to online, and it's now difficult to put the genie back in the bottle."

Poor quality data erodes trust

On the client side, Kevin Woods, senior research director at Brand Finance, says bad experiences with data quality can erode trust in a supplier and put them at risk of damaging their relationships with their customers. Clients are relying on agencies and suppliers to take the burden of quality checks away from them. "Bots and people gaming the system are getting smarter and more plausible," Woods says, "so you have to do the logic check to make sure answers make sense – not just within an isolated section of the survey, but all over."

Steven Thomson, insight director at Brand Finance, gives an example of the sort of additional checks he expects suppliers to make: "Look at data by panel source.

"Bots and people gaming the system are getting smarter and more plausible"

If there are outliers – a brand has 60% awareness, for example, but, on one source, it is only 20% – then you know there is a problem. It shouldn't be down to us to spot this."

Rigorous checks are needed

Agencies and suppliers must put rigorous procedures in place for sourcing samples and checking data early and often. Techniques such as piloting or soft launching surveys, and asking for phone numbers and following up with a proportion of respondents, can all help eliminate problems. Better survey design using techniques such as gamification can also help engage genuine respondents. There is also likely to be a role for artificial intelligence tools, particularly in checking open-ended responses – a key indicator of issues, but hard to check at scale.

Glanville takes a thorough approach to validating B2B respondents. "We don't operate a panel, but we have invested in building our platform," he says. "We always ask about future participation and keep those profiles, so we have about 200,000 verified people. You can verify effectively at the point of incentive payment, because that is when you are checking their details."

Transparent communication builds trust

Data quality – and the way problems are dealt with – can differentiate agencies and suppliers. The most important factor in building trust is open and transparent communication, says Woods, who adds: "I would rather someone came back to me and said, 'we can't do it' than 'we'll give you something and it won't be very good'."

On the client side, there is a growing understanding that these sorts of quality checks take time and cost money; if one supplier is considerably cheaper than another, it is important to investigate and understand why. However, Glanville believes more education is needed. "Sometimes, the people having the discussions about budget aren't the people who understand about the process of data quality," he says.

MRS is taking the lead in the UK on data quality and fraud, working with a number of international partners, including Ronin, as part of a non-commercial initiative, Global Data Quality. "I feel encouraged that the industry has now woken up to this," says Glanville. "It has been a dirty secret for a while, but clients are now getting on board and understanding that you get what you pay for. It's good to be talking about these things."
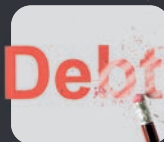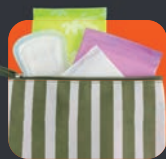
Are you planning or ploughing ahead?

I'd first like to say a huge thanks to C Space for sponsoring the special report in this issue on the topic of foresight. Without our sponsors we wouldn't be able to maintain the quality of our editorial, or produce reports of such pressing relevance to our members.

This is a topic very close to my heart. I was fortunate to learn the value of scenario planning many years ago when I worked at Shell, which was an early master of this particular art. Being asked to look into a crystal ball and make predictions diminishes the value of our sector, so it's heartening to see that research and insight is playing the leading role in more sophisticated, multidimensional approaches that will help businesses prepare for various uncertain futures.

It's October, and that 'should' mean autumn harvest, when crops are set aside in storage to help see us through the hardships of winter. Of course, even this level of planning is now upset by unpredictable changes in our weather patterns. You may have seen in the MRS Annual Review 2022-23, just published, that the society enjoyed a welcome growth in membership and trading over 2023-24. However, now is not a time of plenty, and we know many of our members are feeling the pinch. That's why we are investing our modest profits back into key infrastructure, with a single goal – to improve member services. You may not see an immediate difference, but you will feel it in terms of improved, frictionless interaction with the society.

With the end of one growth cycle another begins, and the MRS Awards (4 December) and MRS Annual Conference (12 March, 2024) will soon be upon us. We have seen a 30% increase in submissions for the awards this year – 316 submissions in total! There is no lack of vital, groundbreaking research going on across public and commercial sectors. Now we're looking for your contributions for the annual conference, and I'm sure we will be similarly deluged with examples of fresh innovation and impactful case studies.

I wish you well in your preparations for the future, and please don't hesitate to get in touch if you feel there is something else MRS could be doing to support you.

Sector and MRS news

Updated Inclusion Pledge
In July, MRS released an updated Inclusion Pledge to improve representation in research, and launched a pledge specifically designed for independent consultants. The refreshed pledge covers the commitment to consider both visible and invisible disabilities in the sector's workplaces. Also added to the pledge is the need to actively consider inclusive research designs and methodologies in projects, and to ensure transparent communication around samples.

Cybersecurity of China
The Cybersecurity Administration of China has published guidelines about outbound personal data and 'important data' from China to third countries. Since 1 March 2023, businesses and individuals must comply with these new measures or risk penalties. See the guidance at mrs.org.uk

Updated Privacy and Cookie Policy
The MRS Privacy and Cookie Policy has been updated, with the addition of new cookies to improve the functionality of MRS websites, an update of retention periods, more information about MRS's use of social media, and improvements to the layout to enhance accessibility. MRS services will not change as a result of these updates and none of the changes will affect privacy or MyMRS account settings.

Making the most of
your membership

MRS membership shows your commitment to research excellence, connects you to a network of more than 4,000 professionals, and gives you access to a huge range of specialist benefits

Mentoring scheme
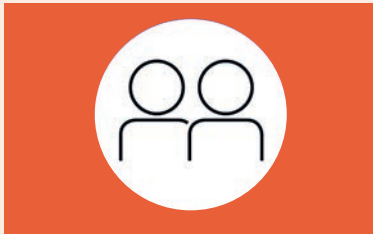
Get a career boost with specialist mentoring

The specialist Mentoring Scheme for research professionals provides members with a framework to develop a broader set of competences and interpersonal skills. Mentoring can help you to review your approaches and optimise your thinking. As a member, you can apply to be part of the Mentoring Scheme, designed specifically for research professionals, where members are matched with an experienced senior professional. There are currently more than 100 mentoring partnerships.

Video library
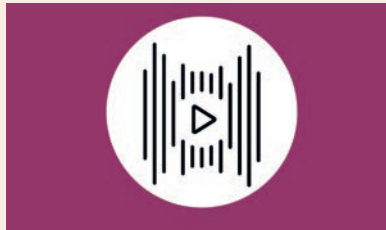
Get inspired and learn with an extensive video library

Members enjoy access to a wide range of free video content, including face-to-face interviews with industry leaders and inspiring keynote speeches from MRS conferences. Brush up on your knowledge by tuning in to hear the Inclusion Group discuss research with working class audiences. Gen Zs discuss what impact upcoming generations will have on research, and Ben Page, chief executive at Ipsos, argue for why we need to stop talking about change.

Training and development
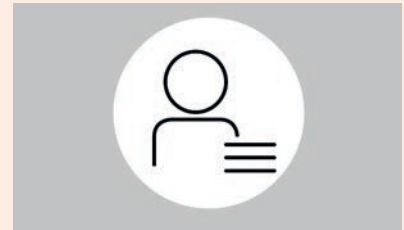
Give yourself the edge with expert training

MRS delivers the widest range of research training and development globally. As a member, you can enjoy up to 30% off each training course, covering the annual cost of your membership if you take a one-day course in 2023. Training includes a broad range of analytical, data and AI tools, as well as storytelling, and commercial and business skills. Our courses are live and online with expert trainers – plus, you can study in your own time with our new range of digital on-demand courses.

Access your benefits

- Sign into your **MyMRS** member account at **mrs.org.uk** to access all of your benefits
- Don't have an account? It's easy to create one at **mrs.org.uk** (top right-hand tab). From here, you can access your benefits, as well as read premium content on **research-live.com**

- The **benefits** available in your MyMRS account include: **GDPR resources; pre-recorded webinars; the Sage Research Methods; guidance on the Code of Conduct; case studies; and *IJMR* (for CMRS and Fellows)**

www.mrs.org.uk/membership/benefits

Diary dates

Professional webinars

Narrative research: the only way to predict future behaviour

Learn about the value of narrative research in predicting future behaviour and discover practical advice on how researchers can gather and analyse consumer stories for maximum impact.
8 November

Applications of behavioural science to quantitative market research

Join our final professional webinar of 2023, when Chris Harvey, from Activate Research, will share powerful real-life case studies, theory and tools to show you how to make the most of behavioural science in quantitative research.
**6 December**

Conferences

Data Driven Insights 2023

Join us for a day of case studies featuring ITV, Boots, Vodacom and Dentsu International, with discussions on how to scale and enrich insight using AI, big data and analytics at our online Data Driven Insights conference.
19 October

Financial Services Research Conference 2023

Gain new insights into the evolving needs of UK consumers as they navigate unprecedented levels of uncertainty during the cost-of-
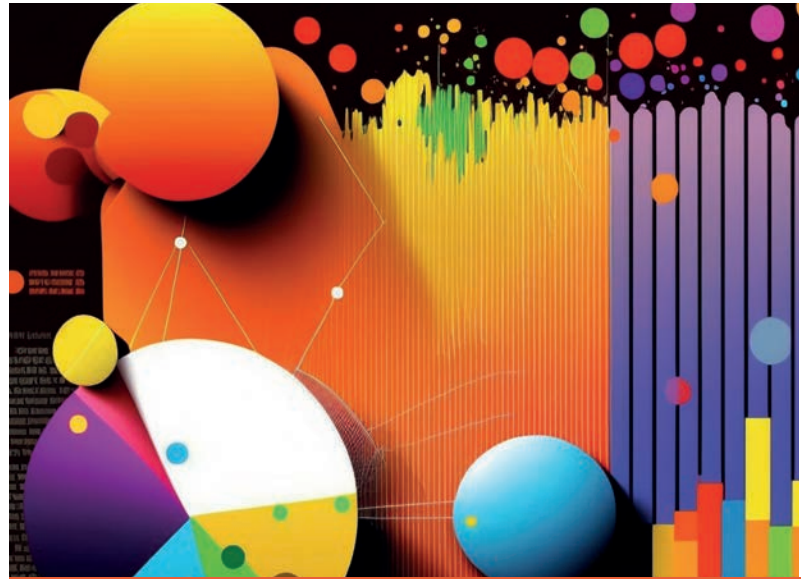
Financial Services Research Conference 2023 – 16 November, in London

living crisis. Discover how financial service providers can maximise engagement with consumers during turbulent times.
16 November

Agency Owners and Leaders 2023

Our new MRS Agency Owners and Leaders in-person conference addresses the most pressing issues facing research leaders. Join us to look at how to boost growth, attract investment, and create great places to work.
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Join this introductory course to

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9 November

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For researchers who work with statistical methods, this course gives a practical understanding of the main statistical techniques used in survey research.
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Mhairi Aitken **is an ethics fellow in the Public Policy Programme at The Alan Turing Institute. A sociologist, her research examines social and ethical dimensions of digital innovation, particularly relating to uses of data and artificial intelligence**

1 Are we too focused on the potential risks of artificial intelligence (AI) rather than the reality?
It's right to be discussing the risks, but it's important to focus on real risks. Recent media coverage has emphasised hypothetical, far-fetched scenarios, where risks come from super-intelligent AI. That worries me, because it's distracting from the very real, present risks that AI poses. It suggests AI could somehow be accountable for its actions and shifts attention away from the decisions of big tech companies. When we talk about risks from AI, it's important we also talk about who is responsible for those risks and who should be held accountable when harms occur.

2 What is the best way to develop ethical data practices?
It's really important to engage with potentially impacted communities – that includes people who may not use a service or product directly, but who might be affected by decisions made because of data practices. Engaging impacted communities in early conversations helps to ensure that data practices are designed, developed and deployed in ways that reflect actual experiences and address concerns, and that, ultimately, are more sustainable and appropriate. It can also provide new insights and creative ideas to maximise the value of data practices.

3 What is the biggest challenge for governments and businesses
behaving ethically when it comes to AI?
Effective regulation will require upskilling public sector bodies and ensuring regulators have access to state-of-the-art expertise on AI, so they can scrutinise claims about compliance properly and know what questions to ask – so regulation can anticipate what might be possible in a year or five years' time. For businesses, the big challenge is resisting the FOMO [fear of missing out], stepping back from the commercial drive for faster and faster innovation and, instead, adopting slower, more considered and responsible approaches focused on creating value.

4 How can researchers better engage the public with AI and data issues?
We need to have open and honest conversations – more dialogue, rather than PR – acknowledging areas of uncertainty, addressing risks, and welcoming public input and ideas to inform future approaches. This touches everyone's lives, so it is important to provide opportunities for people to learn more about AI and data and to get involved in shaping practices.

5 What is the biggest gap in understanding of AI?
AI is often described as being highly technical or complex. Describing it in those terms closes down discussions and limits who can contribute. In reality, you don't need technical expertise to engage. The processes of designing, developing and deploying AI involve a great deal of human

decision-making and judgement; these are human, social processes, the outcomes of which impact our lives in many different ways. Recognising that AI is a human endeavour rather than a purely technical field highlights the value and importance of wider public conversations.

6 Is more regulation the answer to ethical concerns about generative AI?
Alongside regulation, we need culture change in the AI industry. With the explosion of interest in generative AI over the past year, we've seen a return to the 'move fast and break things' culture of big tech. While regulation will define the limits of what is permissible, ethics requires going beyond regulation to address ambiguous questions of what you should and should not do. It's in the responses to those questions that we learn a lot about the values and priorities of organisations.

7 What is the most surprising 'little known' social impact of AI?
While attention is paid to the impacts of how AI is used, much less is given to the impacts of how it is developed – for example, the low-paid, outsourced labour that goes into training models, such as workers in Kenya identifying harmful content for less than $2 an hour. It's really important to raise awareness of how these systems have been developed, and the social impacts of their business models, to enable informed choices and demand that business practices align with social values.

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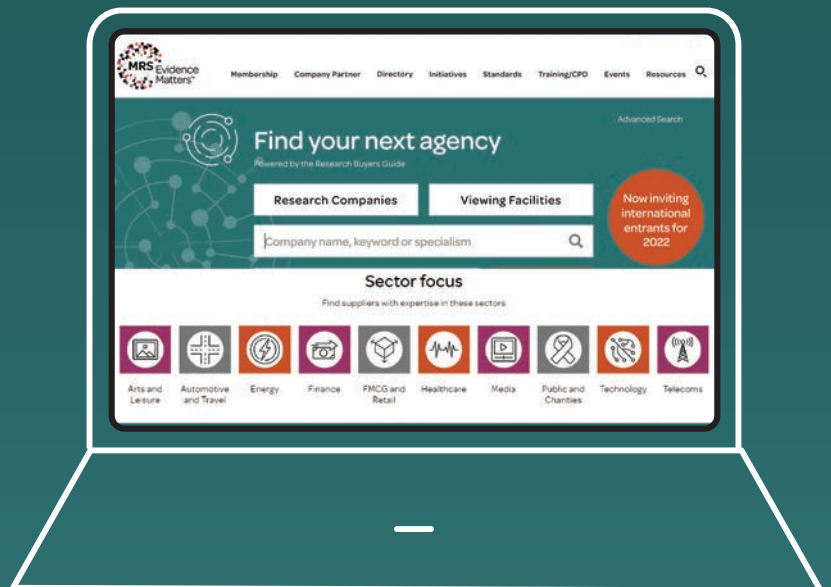from Europe

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