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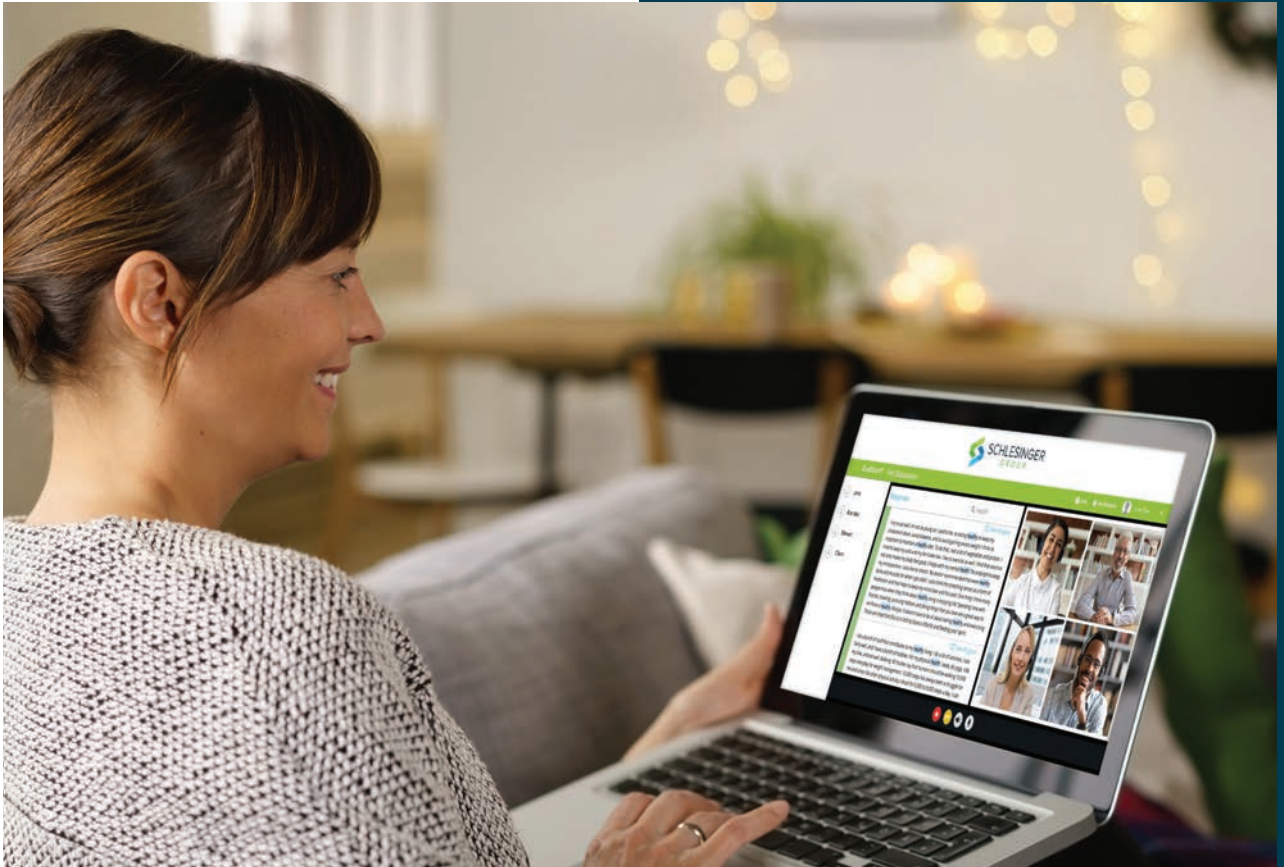
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Branching out

Behavioural science is undergoing new challenges as it evolves from academic discipline to broader application





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Fresh start – but not business as usual



The leaves are turning golden and despite September and October falling into the last quarter of the calendar, this time of year always feels like a fresh start, coinciding with the new academic year and sharpened pencils at the ready.

No more so than this autumn, with restrictions having eased over the summer and a semblance of normality – dare I say ‘business as usual’ – upon us.

Yet while we may have been yearning for some aspects of normal life to resume, we should resist the urge to put on our comfort blankets.

It’s clear that we need to go beyond the ‘business as usual’ mentality as a society – and as an industry – if we are to tackle our biggest challenges.

As we have seen from this sector’s chameleon-like ability to adapt during the past 18 months, even small incremental changes in how we do things can go a long way.

For this issue, it was interesting to hear from some of those involved in the creation of the market research apprenticeship (p50), which has been years in the making and will now help a new generation of researchers to join the sector.

Not only will the apprenticeship forge a new path into the industry and usher in fresh thinking – a critical requirement in a post-pandemic jobs market – it is hoped that it will help to foster greater diversity and bolster the sector’s ability

to respond to its toughest challenges. Because only by supporting and encouraging young, diverse researchers will the industry truly flourish and be able to put its best foot forward – for its clients, its people and the wider world.

Now, what is clear is that we must grasp the nettle of this opportunity; bold, decisive action is needed to ensure that young people in schools and colleges up and down the country have not only heard of market research, but want to come and work here. The time to shout from the rooftops is now.

The establishment of the apprenticeship reminds us that we can’t rest on our laurels, in spite of the challenges of the past 18 months.

Elsewhere this issue, our *Impact* report (p14) focuses on the challenges behavioural science is facing as it branches out from its academic roots.

As the report shows, the potential is huge and creative – its principles have been used to tackle issues as varied as flooding, vaccine hesitancy and preventing cervical cancer, with even a humble flower being used to address the latter. But growth comes with growing pains – including better communication of what behavioural science can do, and what it can’t – that must be overcome if that potential is to be fully understood and realised.

After all, learning is a lifelong process and addressing our growing pains can only make us stronger.



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When gains outweigh losses



Daniel Kahneman, in *Thinking, fast and slow*, recalls presenting to the board of directors of a large Fortune 500 company. Going around the table, he asks the 10 heads of the company's separate divisions the same question: "Would you take a decision where, 50% of the time, you would increase your division's revenue and profits by 50%, but with the risk that 30% of the time your revenues and profits would fall by 30%?"

All but two of them would have declined these odds, even though they represented an expected gain. When asked why, they candidly explained that such a decision would mean that 30% of the time they would lose their jobs.

Sitting aghast at the end of the table is the chief executive. "But I'd want all of you to take those bets, simply because – on aggregate – the gains would easily outweigh the losses."

To which they might have replied: "Yes, it would almost certainly be a great result for you, but terminal for three of us."

There are lessons here about the problem of defensive decision-making in business. Quite simply, most business people are facing vastly more downside risk than upside opportunity. Hence, it's hardly irrational for them to spend far more time dodging blame than chasing sensational success. The consequences of these two outcomes are often highly asymmetrical.

Defensive decision-making is encapsulated in the famous phrase "Nobody ever got fired for buying IBM." It must also be one of the greatest obstacles to the true value of customer research. The most valuable contribution to business made by research – which is undoubtedly its role uncovering unexpected and counterintuitive truths about human behaviour – must too often take a backseat to slavishly following a literal interpretation of what consumers say to allow the person commissioning it to defend an already safe decision.

As consumers are already predisposed to state an over-logical case for whatever it is they want, should this already over-rationalised point of view be further magnified by the client's urge to safely take everything at face value, we see a compounding bias at work.

But there's another lesson from Kahneman's finding, which brings us to the field of systems thinking. Quite simply, in any

complex system (a business, say) it is not safe to assume that the effectiveness of the whole can be optimised simply by optimising its separate parts. This brings us to the question of scale. There is an appropriate scale at which many problems can be solved, and this scale is not necessarily the same scale at which the problem presents itself. Yet, it is fiendishly difficult in a defensive culture to propose solving a problem by anything other than direct intervention, as it is more important to be seen to be tackling the problem than to truly solve it.

A great deal of pointless busyness is created by this urge to seem productive as an individual, rather than contributing to the productivity of the whole. Someone who is always busy feels as though they are operating at maximum efficiency. Yet, from the point of view of a system, one person's busyness is another person's bottleneck. If a document has to be processed sequentially by four of these eternally busy people, the item may take five or six days to traverse the bureaucracy, while, with a

little slack in the system, it could be done in a day. W Edwards Deming, the great guru of Japanese manufacturing of the post-war era, spotted this: "In any system," he argued, "there is an optimal level of slack, and it is never zero." Yet a defensive actor regards evidence of slack as a failing.

Incidentally, when debating the virtues and demerits of flexible working, it strikes me that the entire question is asked at the wrong scale: "Will my own employees be more productive if they are allowed to work remotely?" But there's an altogether different question, which is: "What are the prospects for our business if more of our customers are allowed to work remotely?"

The consumer economy might well benefit significantly from having vastly more discretionary income kicking around once people no longer have to commute or spend a fortune living close to their place of work. The gains we obtain through making our customers richer may easily outweigh any losses in the productivity of office work. If this seems completely mad, bear in mind that Henry Ford spotted this same thing around 100 years ago, when he introduced the two-day weekend for his staff. He did it not out of altruism, but simply because a two-day weekend made it worthwhile to own a car.

●
“Defensive decision-making must be one of the greatest obstacles to the true value of customer research”
 ●

A teal network graphic consisting of interconnected nodes and lines, resembling a molecular or digital structure, set against a dark teal background.

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●
“2.4 billion
people globally
could join the
middle classes
by 2030”

(p10)

There were **534 newspaper
articles** published in 2020 that
mentioned a **UK culture war**

(p11)

**46% of Chinese
respondents said “less
pollution” when asked to
define sustainability**

(p13)

●
“People are not
as fired up as you
would think – they
are just getting on
with their lives”

(p11)

●
“Poverty rates
in Tanzania fell
from 64% in 2015 to
47.4% in 2017”

(p10)

“**68% of young
people in Wales** said
they found it **difficult
to find work** where
they live”

(p12)

Growing giving

Research from the Charities Aid Foundation and Ipsos Mori project examined the past, present and future of the Tanzanian charity sector.

By Liam Kay



The Charities Aid Foundation (CAF) produces an annual World Giving Index, documenting which nations' populations give away the most money, volunteer and undertake other charitable activities. While the report gives a broad overview of the global picture, the challenge for CAF is how to understand what is happening on the ground, particularly in countries that are less rich and globally connected.

As part of this goal, CAF employed Ipsos Mori to research the attitudes to charities and charitable giving in Tanzania, with the support of the Aga Khan Foundation, CS Mott Foundation and the UK National Lottery Community Fund. The project examined individual giving, the likely impact of the expansion of the middle classes in the developing world on charitable giving, and the context in which charities operated, such as government regulations, in Tanzania, as part of a series of similar projects in South Africa, Uganda and Kenya.

Sameera Mehra, head of global alliance and international networks at CAF, says that the reason for examining charitable giving was to gauge the strength of civil society in Tanzania, both financially and within society. "We see civil society and charitable giving as two sides of the same coin, and they are quite interconnected," she explains. "We were looking at how models have worked in certain countries, and how we identify where we could be partnering with local organisations to grow giving."

The researchers conducted desk research on the policies and enabling environment in Tanzania. Informal interviews then took

place with local and regional policy experts, followed by 10 qualitative interviews with local and national civil society organisations, including a mix of small, medium and large organisations, some in cities and some rural, and across a range of causes.

The researchers conducted a focus group with middle-class people, determined using a screening tool based on a 2018 Ipsos study on Africa's rising middle class, and 300 quantitative interviews also took place in the Tanzanian cities of Dar es Salaam, Arusha and Mwanza. Finally, two cross-sector workshops investigated the findings, one with development professionals in London and the other with 60 people from local organisations held in Nairobi, Kenya.

The research found that the average middle-class Tanzanian gave away 24% of their monthly income, much of it through unofficial routes such as helping family, friends and the local community. "A lot is happening informally, and takes very different forms, such as in-kind donations, volunteering and time," says Mehra. "During Covid-19, it became an informal welfare system, like a safety net.

"A lot of giving is what we call informal – it is giving to family, extended family and community. We sometimes miss capturing that. We wanted to get a robust and deep understanding of what already exists."

The results have helped inform recommendations for government, funders and charities to strengthen the charity sector in Tanzania. A big issue raised is trust in and legitimacy of civil society organisations, a problem highlighted in the past year – for

example, the Tanzanian government has cracked down on organisations helping with Covid-19, as it denies it is a problem in the country and has been trying to suppress organisations examining the extent of the issue. There is a lack of understanding of how civil society works and funding it needs, says Mehra, and networks are required to make it easier for donors to give, and for charities to access these funds.

Mehra says the next step is to get more flexible funding into Tanzania, including covering core costs via infrastructure bodies that help provide the "backbone" of the charity sector and create the right funding environment. Work is ongoing to increase awareness of tax incentives for charities in the country – "one part is creating awareness that they exist, and the other part is making them easy to access," explains Mehra.

With civil society still in a vulnerable place in Tanzania, Mehra is aware there is a long road ahead to put the right policies in place: "The challenge now is what is going to stick, and what we need to do to make it stick."

- CAF estimates that 2.4 billion people worldwide could join the middle classes by 2030
- If all those 2.4 billion donated 0.5% of their spending, \$319bn would be raised annually
- Poverty rates in Tanzania have fallen from 64% in 2015 to 47.4% in 2017.

Source: 'Growing Giving in Tanzania' report, CAF, 2020

Across the divide

The ‘culture wars’ phenomenon may not be as widespread in the UK as in the US, but brands may still need to tread carefully. By Liam Kay

At the Republican National Convention in 1992, Pat Buchanan spoke about a “cultural war” equating to a “struggle for the soul of America”.

James Davison Hunter’s 1991 book, *Culture Wars: The Struggle to Define America*, explained ‘culture wars’ as a struggle to define American public life between progressives and the orthodox, while in the UK, many in the media have tried to import this definition from the US wholesale. ‘Culture wars’ today can be broadly seen as referring to the battles between left and right wings of politics and society – Democrats vs Republicans in the US or, increasingly, remain vs leave in the UK, according to the 2018 NatCen report, *The Emotional Legacy of Brexit*. Recent use of the term has surged. In 2015, there were 21 articles in mainstream UK newspapers that mentioned a UK culture war, while, by 2020, there were 534, according to King’s College London research.

Businesses are often caught in the middle. Last year, Coca-Cola condemned a voting law in the US state of Georgia, which followed pressure from activists concerned that the law would unfairly affect the state’s black population, but led to a backlash from Republicans.

Bobby Duffy, director of the Policy Institute at King’s, says the notion of a culture war is

not as widespread in the UK as it is in the US, with its two-party political system.

“It is important to realise what the Americans understand by culture wars – it is not disagreement, or even fractious disagreement, but it is about two entirely different world views that are really difficult to reconcile and compromise around,” Duffy says. “In the UK, there is a much more nuanced picture of fragmented groups rather than two, big, warring monoliths.”

Other research has questioned whether the US population is actually split between two warring tribes. The 2018 *Hidden Tribes* report, by pluralist campaign group More in Common, suggested that 8% of US citizens are ‘progressive activists’, with 19% and 6% as ‘traditional conservatives’ and ‘devoted conservatives’ respectively. The remaining 67% – separated into four groups – is classed as the ‘exhausted majority’ who avoid cultural battles.

However, the report does show the depth of antipathy between the two extremes, based on a representative survey of 8,000 people. For example, 99% of progressive activists included in the sample thought immigration was a positive, while 90% of devoted conservatives stated immigration had a negative impact.

Duffy’s research, published in June 2021, suggests there are four broad UK groups:

‘traditionalists’ and ‘progressives’, which comprise a quarter of the population each and represent the two wings of the ‘culture wars’, as well as the ‘disengaged’, and ‘moderates’, representing the other half of the population. Duffy says his research suggests a large proportion of the population is not heavily engaged in cultural warfare covered in the media, such as on racial inequality or LGBT+ rights, but there is more disagreement on recent political and social movements such as trans rights or Black Lives Matter.

“We hear a lot about the extremes,” says Duffy. “People are not as fired up as you would think from the rhetoric – they are just getting on with their lives and these cultural issues are not their day-to-day concerns. It is not entirely media made or politics driven – there are some actual issues, so we need to take it seriously, but there are not as strong feelings either side of the divide.”

People on the extreme left and right are very vocal, however, meaning that brands need to tread carefully when navigating any potentially controversial issues that arise. Hollie Jones, head of agency at Crowd DNA’s New York office, argues companies need to demonstrate they follow principles they espouse, and avoid “tokenistic displays of support and advocacy”, adding: “Consumers see through things and do their research now. You can’t just claim a value – you have to live and breathe it.”

Duffy adds that half-hearted actions can also damage corporate reputations. “It is not just about communication and what debates you get into – your own behaviour needs to be really aligned with that or you get picked up very quickly for hypocrisy.”



- In the US, 59% of Generation Z (born after 1996) are in favour of additional gender options on forms, compared with 32% of the Silent Generation (1928–1945) (Pew Research Center, 2018)
- 50% of British people have not heard of the term ‘woke’ (King’s, 2021)
- 29% of remain supporters say it’s hard to be friends with people who voted leave, compared with 7% of leavers (King’s, 2021).

Listening to rural voices

Fieldwork under lockdown had several benefits for research in rural areas, particularly in Wales.
By Paul Flatters and Sarah Morris

“I don’t think I’ve ever had the opportunity to voice my opinion on rural Wales before.” This comment was made in an online focus group conducted as part of a study on rural youth in Wales, led by independent consultant Ffion Storer Jones. Tired of the lack of research undertaken on rural young people in the nation, the study focused on young people, aged 16 to 28, living, working or studying in rural Wales, and the report highlights their views, needs and aspirations.

An unexpected benefit of the pandemic was the variety of participants it allowed to recruit. For example, one group of six for the research on rural youth in Wales included a student from Ynys Môn (Anglesey), a farmer from Sir Benfro (Pembrokeshire), and a single mum from Cwmbrân. Would these articulate young participants ever have ended up in the same focus group without Zoom? Early in the first lockdown, we had

farmers drive to a lay-by down the road to join a focus group from their smartphones, sitting in their trucks. One of these projects was for agricultural technology start-up CropSafe, which is creating an app to help farmers predict weather and soil conditions for harvesting. Farmers from the Scottish Highlands, Northern Ireland, mid-Wales, Cumbria, Norfolk and Devon came together online to share feedback on their month-long trial of the app.

One interesting insight that came out of these groups is that farmers may not be as concerned about data privacy issues as other consumer groups. In response to a question about GPS tracking built into an app, one participant said: “I’m not too bothered if people know which field I’m in.”

In fact, we have found that farmers are becoming more and more tech-savvy with the rapid rise of agricultural technology and the rollout of 4G across rural areas. FieldMouse Research launched its Opinion

Harvester panel in partnership with Alligator Digital earlier this year to allow farmers to provide their views for research.

In an online survey for research undertaken on rural youth in Wales, funded by the Henry Plumb Foundation, 89% of respondents said they still live in the place where they grew up. However, 60% are considering moving to a town or city, as 68% of respondents said they found it difficult to find work where they lived. Only 11% positively stated that they “have a say in the way that decisions are made in rural Wales”.

With 80% of young people in Wales agreeing that “the Welsh language and its future is very important”, how often do researchers consider Welsh speakers as a minority group with a distinct cultural identity that frequently attracts prejudice, and ensure inclusion? The same, of course, is also true of Gaelic speakers in Scotland.

“Speaking Welsh and going through school in Welsh, I’m sure I’ve had so many more opportunities than a non-Welsh speaker would have,” said one respondent. Only three per cent of those surveyed spoke no Welsh at all.

Other major issues raised by young participants in Wales are shared with many other rural areas across the UK. For example, it was felt that bus timetables are targeted towards the older generation, leaving younger people reliant on having their own car or getting a lift. Second homes were also raised, and it was felt that the government should legislate to ensure homes are affordable for people who wish to live and work in the area where they grew up.

We’ll only know that rural voices are heard in the research industry when focus groups are recruited in Cornwall or Northumberland on, for example, a new brand of biscuit or cat food for a client in the fast-moving consumer goods sector.

● Paul Flatters and Sarah Morris are the co-founders of FieldMouse Research



Rural fieldwork dos and don'ts:

Do

- Interview by telephone and post out material
- Expect participants to have never taken part in research before.

Don't

- Wait for a 'rural issue' project to turn up – include a rural quota in all fieldwork.

- 79% of consumers say sustainability is important to them
- 60% agree that sustainability has increased in importance to them this year
- 58% say they've reduced household waste over the past three years.

Source: Bamm research in the UK, US and China

New hope

Sustainability is a major global issue, but it means different things for brands and consumers in China, the UK and the US. By Mark Potts

At the end of the promenade in Penzance in Cornwall, site of this year's G7 summit, sits the UK's first outdoor geothermal pool. The Jubilee Pool, an art deco lido built in the 1930s, reopened in 2018 fuelled entirely by renewable energy.

Across the world, leaders are grappling with climate change. For example, Xi Jinping last year re-emphasised China's commitment to capping and reducing carbon emissions. The question is: what do consumers think about sustainability? This was the question Bamm wanted to answer with our sustainability project, which used a combination of 15 online ethnographies and a '500 person per country' survey across the US, UK and China, in addition to both social and content listening (analysing the content of brand advertising).

Most people (79%) across those markets feel sustainability is important. Most people (60%) also feel that sustainability has become even more important over the past year. Perhaps the pandemic created a sense of fragility about the world, which has haloed over to the planet. Or perhaps people found purpose in sustainable behaviours at a time where everything else felt a little lost. Whatever the reason, the message is clear: now is the time to be

engaging people around sustainability.

However, 'sustainability' is an amorphous term and means lots of things to different people. The United Nations, for example, has a breadth of activities within its 17 'sustainable development goals' including areas such as increasing gender equality, reducing poverty, and global peace. What's clear from our study is that consumers have a different, tighter perspective that is much more orientated around waste and nature. The top things sustainability means to consumers is "reducing wastefulness" (40%), "keeping natural systems in balance" (38%), and "looking after the world" (36%). Only very few associate the space with the UN goals – for example, "reducing poverty" (11%), "global peace" (11%), or "equality for everyone" (14%).

We ran text analysis of 32 sustainability video ads from big brands over the past year. For brands, sustainability messaging tends to be around the climate and energy. The top five nouns used across those adverts were "people", "energy", "world", "carbon", "electricity". For consumers, sustainability is squarely about wastefulness and recycling, and the top five nouns were: "environment", "resources", "recycle", "waste", "planet" according to open-ended survey responses. The question for brands is should they tack to how consumers currently think about sustainability, or should they look to influence their opinion?

The research also found that for Chinese people, sustainability is more directly linked to pollution and looking after their

country, driven in part by air and water quality issues in the recent past. For our question "What does sustainability mean to you?", 46% of Chinese respondents said "less pollution" versus 35% in the UK and 27% of Americans. The research also found 40% of Chinese respondents said "looking after your country" versus 23% in the UK and 22% in the US.

In China, technology is a marker of how sustainable a company is, more so than in other countries (here the Chinese consumer may be ahead of the other markets). For the question "What's most important to you when considering whether a company is sustainable?", 32% in China say "that the company provides or uses technology that helps sustainability" versus 13% in the UK and 16% in the US.

This shift in emotions around sustainability seems to be coming from several places. First, there's a sense that if we can get through Covid-19 we can get through anything. Second, there's a sense of belonging that seems to have given people a feeling of purpose and pride. And third, there are more hopeful messages and influencers out there around sustainability who are showing that things can change.

The message overall is clear for brands: take sustainability seriously. Meet consumers' growing focus on the space. Decide whether to lead and influence with messaging around energy and climate, or incorporate more of a 'waste reduction' approach. And, whatever you do, go forward with hope and determination.

● **Mark Potts is chief strategic officer at Bamm**

The growing pains of behavioural science

As behavioural science grows from its academic roots to become more applicable for wider use, it must address a new set of challenges and opportunities. Elen Lewis reports

Behavioural science is no longer a peripheral activity. From nudging people to make better choices about health and helping to combat climate change, to empowering the business world to better understand consumer behaviour, this discipline is influencing many areas of life.

There's no question that best practice in this discipline has a magical potency. These examples are almost Disney-like in their impeccable storytelling. Take the Colombian Ministry of the Environment and Sustainable Development's work with Ogilvy on the problem of the pesky lionfish,

“We’ve been making it up as we go along... some of the best practice hasn’t emerged yet”

escaped from an aquarium and endangering hundreds of species. Behavioural science helped to solve the issue with a beautifully simple idea – eat it. By working with Colombian chefs and creating an entirely new supply chain, Colombians were encouraged to eat the lionfish, depleting its numbers. With 80% of the country's population Catholic, even local priests were encouraging their congregations to try lionfish for their Lent and Easter dinners. Colombians ate one species and saved thousands in return.

There are 300 behavioural science teams (and counting) in governments, businesses and organisations globally – the discipline has expanded greatly. However, with growth come growing pains. As behavioural science travels

on its journey from academic wizardry into a standardised practice that can be applied effectively in the commercial world, it faces a new set of challenges.

“We’ve been making it up as we go along. We’re taking what we know about business, marketing and public sector challenges and bringing it together with academics. The growing pains are simply there because it’s a new field and some of the best practice hasn’t emerged yet,” says Tara Austin, consulting director, behavioural science practice, Ogilvy. Austin was a founding member of Ogilvy Change, the agency’s behavioural change practice, and was behind an experiment to reduce antisocial behaviour in Greenwich after the London riots by painting babies’ faces on shop shutters.

Independent behavioural scientist Nisa Bayindir agrees that there are growing pains happening with applied behavioural science. “This is an area that







draws a lot of attention,” she says, “but clients don’t know what to do or how to integrate it into strategic research development.”

Bayindir wants to see more behavioural science education among clients and agencies. “They [clients] don’t know what behavioural science can offer that quant or qual can’t. Companies need to decide what their offering will be. Is it action-orientated – how to get consumers from A to B? Or is it about understanding why something is being done or not done by consumers?”

Bayindir has a useful analogy to differentiate between behavioural science and quantitative and qualitative research. Behavioural science allows you to see a map of a whole city, while qual and quant help you zoom into one street.

Better communication about the value of behavioural science can put everyone on an even playing field, argues consultant Richard Shotton, author of *The Choice Factory*. “Experts need to communicate as simply as possible. It doesn’t have to be complicated. You can explain everything in two minutes.”

Behavioural science defined

One of the ‘growing pain’ issues with behavioural science is a misunderstanding about what it really is. It’s best to consider behavioural science as an umbrella term for many different disciplines that combine to give a greater understanding of human behaviour.

These might include economics, consumer psychology, neuroscience, marketing psychology, judgement, social science, decision-making, sociology, anthropology, and more. “It is the cross-disciplinary, open-minded science of understanding how people



behave. It cross-fertilises, and brings closer together, insights and methods from a variety of fields and disciplines,” says Matteo Galizzi, associate professor of behavioural science at the London School of Economics.

It wasn’t long ago, for example, that behavioural science was more widely known as behavioural economics, but this semantic shift seems to be indicative of the evolution of the discipline. Implicitly renaming behavioural economics as behavioural science widens its influence and practice.

“Over the past six to seven years, there’s been a worry that what we communicate as an industry has been hollowed out and reduced to a collection of buzzwords,” says Ian Murray, co-founder of House51. “Behavioural economics is a term we think twice

The Flower of Life

In Brazil, the women of the Amazonian rainforests are three times more likely to have cervical cancer than the rest of the population. But in an area deep in the forest, with no roads or mobile phone signals, and low literacy rates, the Brazilian health department was struggling to come up with a solution to remind women to have regular pap (smear) tests.

Traditional communication – such as leaflets, posters or other advertising media – would not have

an impact with this audience. A ‘nudge’ to drive change needed to be culturally resonant. Plants were already relied upon by local communities for sustenance and medicine, so nature offered a creative intervention to help change behaviour.

The Flower of Life is an orchid from the cattleya hybrid that blooms once a year. More than 5,000 were distributed to Amazonian women through social workers, health

department workers and local events, impacting one million women.

Developed in batches, the flowers bloom at different times each year, so as not to overload the health service. The women say the flower acts like a calendar, reminding them to attend a clinic for their annual gynaecological exams.

The Flower of Life message was created by Ogilvy Brazil for Hermes Pardini Laboratories and Para State Department of Health.



about using because the popular interpretation is that it's become how to figure out which button to press to control people. That implication has led to a reductive and damaging culture."

Ogilvy's Austin is convinced that language is a key challenge facing behavioural science today. "Our language doesn't marry up to our thinking," she says. "It's like the Sapir-Whorf hypothesis - if we don't have a word for something, we can't understand it. Our language of how we categorise interventions is not there."

Austin points out that there are big differences between behavioural science interventions such as price framing, procedural change or a physical intervention. While price framing might result in a brand anchoring value in a comparison - by framing a monthly gym membership as the same value as 10 flat whites, for example - procedural change might be seen when a form moves from being opt-in to opt-out to encourage a particular behaviour. In 2015, for instance, when UK workplace pensions changed to become opt-out, more than nine million

"We need to keep asking ourselves, 'what are we trying to do with this?' If we're not careful, we end up having a values and beliefs conversation, rather than an outcome conversation"

UK employees began saving for their retirement.

In contrast, a physical intervention to encourage abattoir employees to wash their hands by stamping them with a sticky ink print of a picture of salmonella as they enter work, which then needs to be washed off, feels very different. Yet these interventions are described in the same terms.

Replication crisis

Another growing pain for behavioural science is the replication crisis. After the Nosek study in 2015, when Brian Nosek's lab was unable to reproduce findings after replicating 100 studies from three psychology journals, replication of studies have been put under the microscope. It's important to note that behavioural science is not alone; there is a replication crisis in other fields, too, including cancer research and economics.

Shotton, however, believes the replication crisis has a positive side. "This is an evolving discipline getting rid of bogus findings," he says. "As long as people are learning and we're stopping reference to studies



found not to be true, then the psychology is becoming more powerful.”

Alongside replication, academic psychology experiments face criticism because of the ‘weird’ phenomenon. Participants of academic research are overwhelmingly ‘weird’ – that is to say, western, educated, and from industrialised, rich and democratic countries. They also tend to be college students from the US. This lack of diversity of the source of data shines a new light on many findings, suggesting it is not a world view.

While Murray is concerned about the lack of diversity and inclusion in the data, he believes this questioning is only a crisis if behavioural scientists take everything at face value. “Our industry needs to be more discriminating about the science rather than applying popular greatest hits without thinking deeply about it,” he says. “We have an opportunity to help

move the science forward by testing frameworks using mass samples. We should be participants of the science rather than uncritical clients of the science.”

Working with Thinkbox, for example, House51 replicated a small, academic biology experiment on the idea of costly signalling with a large, nationally representative sample of 3,000. In the field of advertising, this theory can help to explain the success of large sponsorship deals or the appeal of a Super Bowl ad. Costly signalling – the idea of the peacock tail – is harder to fake and, therefore, more believable.

Thinkbox wanted to make a similar link with TV as an effective, premium ad channel. While the science suggested this should be the case, it was a calculated risk, but the research confirmed that TV remained a good place to invest marketing budget, even alongside social media. Moreover, the costly signal for TV was

just as strong for 16- to 24-year-olds versus social media as a channel. “If you do something rigorously and in a way that moves the science on, there has to be a commercial edge,” adds Murray.

Sometimes, it feels as if behavioural science might just change the world and make it a better place. Stories in this discipline are seductive and powerful because, often, the best examples of the practice happen in the public health space – such as reducing child mortality in the Ecuadorian Andes, where more than 300,000 children suffer from chronic malnutrition. Living in isolation, far from health centres and with a cultural mistrust of modern medicine, many of these children’s health problems are undiagnosed.

Using the *sikinchi*, the blankets local mothers use to carry their children on their backs, different patterns in local dialect marked out different sizes of children according to the World Health Organization. By tapping into a local, cultural icon, the Ecuadorian health department, with Ogilvy, was able to change behaviour with a ‘mother blanket’ that doubles as a paediatric evaluation system.

While there are hundreds of examples of nudging for good, the danger of ‘sludge’ – using nudges or interventions to manipulate people for the wrong reasons – continues to be a concern.

In *Nudge*, Richard Thaler and Cass Sunstein identify three guiding principles that should be top of mind when designing nudges: they should be transparent and never misleading, easily opted out of, and driven by the strong belief that the behaviour being encouraged will improve the welfare of those being nudged.

From academic enclaves to corporate outcomes

The academic roots of behavioural science bring additional challenges beyond replication and ‘weird’ participants. Colin Strong, head of behavioural science at Ipsos, believes it’s time for the market research industry to focus on client outcomes, rather than getting caught up in the content and the process. “We need to keep asking ourselves, ‘what are we trying to do with this?’ Otherwise, if we’re not careful, we end up having a values and beliefs conversation, rather than an outcome conversation.”

Strong believes more standardisation and codification of behavioural science will help overcome this particular growing pain. “The discipline is moving, and needs to move, away from a small

number of guru experts performing magic and into the hands of a wider population, where the expertise is operating within evidence-based frameworks to deliver positive and tangible outcomes.”

While those operating in a particular space will consider their expertise hard to replicate, the challenge, according to Strong, is that it will never scale. “We need a democratisation of expertise, rather than leaving it in the hands of a small number of

people who are gatekeepers to this knowledge. For example, the expertise of survey design has been codified and standardised, and I believe behavioural science should go down the same route.”

Standardising behavioural science is good for education because it “sticks”, says Bayindir. “But these models mostly come from academia and aren’t always widely applicable. We need to choose them with care for applied behavioural science because they might be too theoretical. Practitioners shouldn’t just apply the Com-B model and forget their curiosity. This is a living, breathing discipline.”

Behaviour-change models

The models Bayindir refers to are plentiful in the space – there are myriad behaviour models from the academic world that practitioners might use for behavioural science projects. Three that gained common grounding include the Com-B model, the East model and Mindspace (see boxout, ‘Behavioural frameworks’). Many market research practitioners have also developed or adapted these models for their

“Behavioural science draws a lot of attention, but clients don’t know what to do or how to integrate it into strategic research development. They don’t know what behavioural science can offer that quant or qual can’t”



own purpose. For example, Ipsos uses Mapps (motivation, ability, processing, physical, social), and Shotton expanded the East model into Creats (context, relativity, easy, attractive, timely, social).

Ipsos used a behavioural science lens to better understand how to encourage Scottish homeowners to protect their property from flooding. With more than 284,000 properties in the country at risk from flooding, the Scottish government wanted to identify what would encourage homeowners to take steps to manage flood risk and make their properties more resilient.

After qual research, Ipsos used two behavioural change models - ISM, a model used by the Scottish government to analyse individual, social and material factors that might shape behaviours, and its own Mapps model. It recommended clear, targeted and timely communications to encourage homeowners to take flood risk seriously and take the necessary steps to protect their home.

The new power couple

With the addition of technology, behavioural science is being scaled in a way not possible previously. Practitioners are also using it in tandem with other disciplines, such as data analytics, opening the doors

for broader use and allowing companies in a variety of sectors to design better processes.

Crawford Hollingworth, co-founder of The Behavioural Architects, believes the coming together of data science and behavioural science has created the new power couple through its analysis of human behaviour on a much larger scale. He cites the example of the New Mexico government, which reviewed big data through a behavioural lens to identify three key moments when citizens are most

likely to lie on their benefit claims forms: when entering reasons for leaving their last employment; when answering the question, 'did you work this week?'; and when confirming whether they had completed at least two work searches in the past week. Building on these moments, the team used priming and social norms, asking claimants to initial their statements because this can improve honesty. "New

tech, such as the internet of things, means data can become available in real time, allowing for advanced personalisation and nudges tailored to context," Hollingworth says.

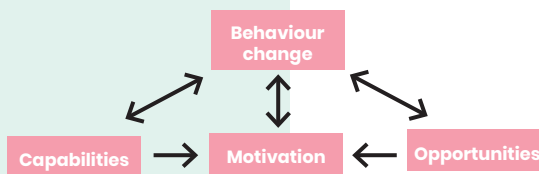
Ipsos's Strong also believes there's opportunity in linking behavioural science with data analytics, "to provide hypotheses about what we might find from the data and from making sense of patterns. We need

“If there are humans making decisions, behavioural science can have a role”

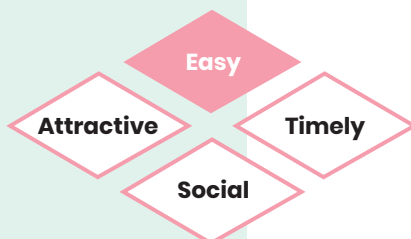
Behavioural frameworks

Three codified methods for characterising and designing behaviour-change interventions

The Com-B model



The East model



Mindspace

Messenger - we are heavily influenced by who communicates information

Incentives - our responses are shaped by predictable mental shortcuts such as avoiding losses

Norms - we are strongly influenced by what others do

Defaults - we go with the flow of pre-set options

Salience - our attention is drawn to what is novel and seems relevant to us

Priming - our acts are often influenced by subconscious cues

Affect - our emotional associations can powerfully shape our actions

Commitments - we seek to be consistent with our public promises, and reciprocate acts

Ego - we act in ways that make us feel better about ourselves.

(Source: Institute for Government)




inductive and deductive approaches, and for them to work together. Try to derive straight insights from data analysis without guiding principles of what to look for and how to make sense of what we find, and we will struggle to make sense of it.”

For Google, The Behavioural Architects used behavioural science to help make sense of a big set of data – 36,000 online consumers – to understand decision-making and how to influence it during the online research process. Combining disciplines revealed a new model of decision-making that reflects the complexity of shopping behaviour in the internet era. The central component is the ‘messy middle’ – a loop consisting of complementary states of exploration and evaluation during shopping.

It also revealed how brand preference can be transferred within a category through the application of behavioural science principles. Across 31 categories, people’s second-preferred brand can be made more appealing than their first by ‘charging’ it with stronger executions of behavioural science principles, such as category heuristics, authority bias and social proof.

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GAME CHANGERS 

What does the future look like?

As behavioural science matures, what might the future look like? Ogilvy's Austin would like to see an improvement in the language used to categorise interventions, a series of dominant models with which everyone is comfortable, more unusual ways of testing and piloting, and real-world approximation of interventions.

Not everything can be tested, of course. "How do you test a flower?" Austin asks. "Some of these interventions are highly creative and just require bravery.

"The truth is that behavioural science should be in everything. Any human decision happening anywhere, behavioural science will have something to say – whether that's in talent management, how to organise food in a canteen, or people wearing face masks. If there are humans making decisions, behavioural science can have a role."

Strong agrees, but with a caveat: "Behavioural science has a fundamental role to play in all big questions we face, and we need to be bold in the way we think about them – and modest; this is a perspective and there are other perspectives."



The role of behavioural science

Behavioural science has gained a strong and clear mandate among policymakers and marketers as a discipline that is, first and foremost, about making change happen. This represents a significant shift for the field, which tended previously to focus on new ways to understand people. A new openness has developed to accessing the social science literature to unpick human conduct, finding new ways to describe and account for behaviours.

While this was necessary, it is certainly not sufficient: the focus has now, rightly, moved to the outcomes the discipline can deliver and away from the detail of the 'method'. It is not enough to enhance our understanding; we need to use it to deliver tangible outcomes in terms of changed behaviour.

So, why has behavioural science gained such prominence now? After all, it has a long history in academia, but it is only recently that it has

moved much more centre stage in applied settings. This is because of the huge changes and challenges we now have to navigate – such as climate change, digitisation and Covid-19. The increased instability and unpredictability of our lives means that, while people are often keen to make change happen, it is not always easy to enact the outcomes they seek.

Behavioural science expertise is directly helping to navigate these turbulent times, facilitating a wide range of positive commercial and social-policy outcomes.

So, how will behavioural science continue to have an ever greater role in driving change? All professions, necessarily, go through their own evolution, where expertise is democratised to allow access to a broader range of people. We can see the same trend with behavioural science; its strength comes from bringing other disciplines – such as

market and social researchers, service designers, digital specialists and data analysts – into the fold. Exciting new frontiers are being created that mean behavioural science is becoming an essential way of understanding and navigating the world.

Applied behavioural science is rapidly evolving as a critical tool for driving change, which positions it firmly as a means of supporting marketers and policymakers to meet commercial and policy objectives.

Perhaps this is the real change we are seeing for the discipline: rather than finessing and refining at the home straight, we are now front and centre of much more holistic transformation strategy, and, as such, very much in the centre of decision-making for any organisation.

● Colin Strong, head of behavioural science, Ipsos

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GAME CHANGERS



Pedal to the floor

Jaguar Land Rover's brands have been a cornerstone of the British car industry for decades, and global customer insights director Joanne Pearson is focusing on how to keep the company moving forwards. By Liam Kay

The word 'jaguar' has a very good chance of bringing to mind the car rather than an Amazonian feline. Jaguar has been at the centre of the UK's car industry for almost a century, and remains one of the country's most recognisable automotive brands.

In 2013, Jaguar merged with fellow former British Leyland brand Land Rover, creating Jaguar Land Rover. The two remain separate brands within the same company, but both operate at the 'prestige' end of the car market. For

both, identifying the typical driver is crucial. However, with a product as difficult to design and construct as a car, the process of identifying that typical driver is fraught with risk.

"The nature of the automotive industry is you can't 'turn on a sixpence'," says Joanne Pearson, global customer insights director at Jaguar Land Rover. "The motor vehicle is the most complex consumer product you can buy, and they get more complex as they get more connected, with more safety features and automation, and the

more legislation that they have to meet.

"The life cycles and development cycles of vehicles are many years – it is not like a fast-moving consumer good, where you can turn around from concept to being in store in weeks or months."

Pearson heads Jaguar Land Rover's customer insight globally, leading a team of 12 people based mainly in the UK, as well as North America and China. Her responsibility is to bring the voice of the customer into the company. Syndicated studies, common in the



automotive industry and in some cases running for decades, are often used by Pearson's team, and there is work with long-standing agency partners.

Jaguar Land Rover is currently implementing a new customer experience programme that will run in 84 markets across the world, with support from Ipsos and Medallia. The programme examines customer feedback to the buying process, considering how the company is performing and delivering customer experience. Between its launch in April and July 2021, the team analysed more than 100,000 customer responses. Generally, there were more people satisfied than unsatisfied with the company's performance, according to the research, and people who raised concerns or problems were identified and attempts were made to address these specific issues.

Pushing boundaries

As cars take years to develop, from concept to market, and each requires thousands of different elements, with multiple teams working independently of one another on the final product, Pearson says that it can be very difficult to research the needs and desires of future drivers. With Jaguar Land Rover there is an additional challenge, as it operates in the premium end of the market, which is competitive and financially out of reach for the average person.

Take the example of the latest Land Rover Defender, the most recent version of which was released in 2021 and appears in the James Bond movie *No Time to Die*, out this autumn. The research supporting the development of the Defender, carried out internally, began with identifying the ideal 'target customer'. Pearson says that the target customer for a car is often someone who "might be driving a different car at the moment, but they fit the profile of who we are designing this car for". This is honed down to a small group of drivers, or even an individual who is considered 'the bullseye' – the ideal buyer for the car. For the Defender,



research identified the target market as people who push the boundaries in life, have an eye for great design but who also want the car to be functional, are individual, seek out nature and are free spirits, according to Pearson.

Everyone working on the Defender was given details about the identified target driver's attributes and asked to hold them in mind during development. The target customer was even named to increase familiarity. "We understand their lifestyle, what they want from the car, how they will use it, how the car fits into their lives and what's really important to them," says Pearson.

The customer insight team recruited potential buyers of the Defender to gather their views on the initial concept, and then again when a model of the car was ready. As with many similar projects, research participants were brought to a secure location to see life-size prototypes of the Defender under tight security with confidentiality agreements, and then asked to give their perspective on the car's features.

Once the car has been developed,

work then turns to the pricing and positioning of the vehicle on the market, considering the future driver and communications strategy. Pearson says the Defender's 'Capable of great things' tagline came from the original target customer for the vehicle as identified by the research team in the initial stages of research supporting the car's development. It specifically emerged from a phrase used by a participant in the team's qualitative research into the Defender, and ended up being used throughout the rest of the research into the car and in its advertising. "The tagline has a duality to it – it describes the vehicle but also describes the people who are going to drive it," she explains. "People drive Land Rovers because the vehicle is unstoppable and they are unstoppable. People often buy vehicles because they are a reflection of them and their personality."

Once a car like the Defender goes to market, the customer insight team will also conduct research with early buyers, finding out who they are, whether they matched the target customer, what they





Defenders taking part in practice runs for stunts for the Bond film *No Time To Die*

liked and what they did not rate. This information is used to inform further updates and new features.

Video is vital in bringing the customer voice into the design process, explains Pearson.

“We strongly believe in the power of seeing the customers, and we therefore produce a lot of video output – there are very few projects where we wouldn’t have a video to accompany it,” she says. “That’s very powerful – what can be said in a video clip can be very efficient for the people consuming it.”

Insight is also shared across the company through a customer insight portal, which allows colleagues to access research and set up alerts for when new material is published.

Not every part of the car is researched individually at Jaguar Land Rover, Pearson adds, with features such as tyres and lighting quite similar across different ranges, but the insights team focuses on features including entertainment systems and seat materials. “Each car has thousands of different components, and so there are a lot of people working on each vehicle,” Pearson states. “There are some components that are less customer-facing that might be in the vehicle for

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“We need to deliver insights to help business decisions”
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safety or sustainability, and then there are other parts that we could do with customer feedback on.”

Clear skies

The car industry is going through a period of flux, with sales of petrol vehicles due to be banned from 2030 in the UK, and many parts of the world planning to phase out the internal combustion engine in favour of greener alternatives.

“We are constantly monitoring how quickly consumers might want to transition from the internal combustion engine to electric vehicles, what their expectations are, and what some of the challenges and barriers are that we can help with to aid the transition,” says Pearson.

“If you or I just thought about what we might be doing in five years’ time, what our lives might be like or what we might want from a category, it might be quite difficult to say. We need to deliver

insights to help business decisions, but some of it is about an uncertain future.”

To examine some of the impacts of electrification on the company, Pearson’s team has been looking at whether people are willing to buy electric cars now or whether they want to go for plug-in hybrids first, which use both fossil fuels and electricity to reduce carbon output while not fully embracing carbon-free fuel.

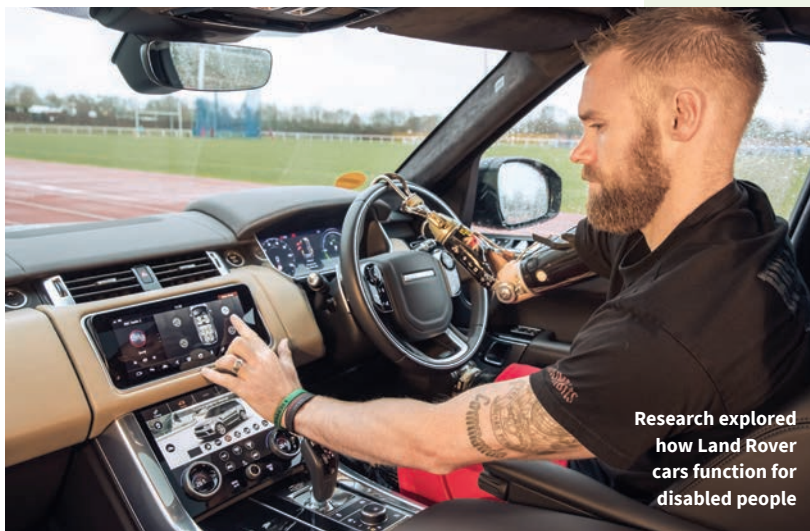
The company already has fully electric vehicles, such as the Jaguar I-Pace, and Pearson’s team has undertaken some qualitative work into the triggers and barriers in the decision-making process behind moving to an electric vehicle, including issues such as a lack of charging facilities, and how to market it in a way that addresses customers’ concerns about electric cars.

Covid-19 has been a challenge, robbing the company of the ability to deploy user testing during the design and manufacturing process, mainly due to the need for complete secrecy about the product. While home ethnographies have opened people’s homes and cars using videos, and the company has used online surveys, not everything in the usual research cycle was possible while restrictions were in place.

Jaguar Land Rover's research team did track how people were responding to the pandemic, and how this influenced attitudes to cars and buying behaviours. The company is also monitoring how long-term trends in other industries – such as pet ownership or staycations – could impact car usage and preferences.

“People have seen the car as a safe haven, and also as a release,” Pearson says. “In points of lockdown, customers told us they sat in the car, put some music on and explored the technology in the vehicle in a way they hadn't done before, or gone out for a drive to get out of the house. When liberty and freedom are more constrained, people value their car more than ever.”

With a prestigious past behind it, the company is looking to the future with relative confidence. Future priorities for the insight function include examining the rapid changes occurring in the Chinese market, such as new fashions, competitors and changing expectations of luxury car brands; the customer experience and how technology is changing the way customers want to interact with companies; and Jaguar Land Rover's appeal to Generation Z. The research team will be looking to keep the business on the road for the challenges and opportunities that lie ahead.



Research explored how Land Rover cars function for disabled people

Case study Addressing disability

In 2019, Jaguar Land Rover joined the Valuable 500 scheme, a campaign for businesses to take greater account of disability. The company decided to focus on including more disabled people in research samples, ensuring their vehicles are more accommodating.

The first phase of this research involved using several research agencies and the company's links to the Invictus Games for disabled armed forces veterans. A qualitative study saw games participants invited to drive Land Rovers on an off-road course near Eastnor Castle, Herefordshire, to understand what features and functions of the cars worked for disabled people, and where improvements could be made.

A conference was held for 500 Jaguar Land Rover employees, with research participants from different backgrounds and disabilities presenting on and discussing how car designs could be altered to ensure that everyone could use them.

Subsequent product research has recruited disabled customers or the friends and family of disabled people for focus groups to examine what works well in the company's vehicles, what does not, and highlight potential improvements.

Among the changes included in future Land Rovers was a power-assisted door, as well as alterations to the ingress and egress from the vehicle – such as grab handles – and the need for durable and robust materials on seats and space for wheelchairs. Some of the findings were less obvious.

“You find some fascinating differences between someone who is missing limbs and is an amputee, and someone who has paralysis – their body temperatures tend to run a few degrees different,” Pearson says. “Therefore, compartmentalised climate controls are very helpful. We discovered a lot of features we didn't realise were brilliant functions for people with disabilities.”

Still from
#WombStories
advert



Telling women's stories

Women's experiences are at the forefront of a body of work from feminine care brand Bodyform, with research helping it take on still-taboo topics. By Katie McQuater

Women are historically woefully misunderstood and rarely accurately represented by the corporate world. Feminine care brands have typically avoided the complex, multifaceted reality of women's bodies in marketing their products, with advertising depicting carefree women wearing white jeans, and blue liquid shown in lieu of period blood.

Bodyform's '#WombStories' campaign was different. The three-minute ad, developed by Abbott Mead Vickers BDO (AMV BDO), which ran across TV,

YouTube and social media in 2020, portrayed the pleasure, the pain, the love and hate women associate with their bodies, telling different 'womb stories' through various animations and creative worlds.

In one story from the ad, fertility struggles are portrayed by a lovingly tended garden and a barren wilderness. In another, angry red flames represent the menopause. From first periods to not wanting children to dealing with agonising pain, the film captures the various impacts women's bodies have on their lives.

Radical listening

Bodyform, part of global hygiene and health company Essity, wasn't afraid of taking a bold approach with its marketing – previous campaigns have focused on normalising period blood (2017's '#BloodNormal') and celebrated the female anatomy (2018's 'Viva La Vulva'). What made '#WombStories' different to anything Bodyform and sister brand Libresse had done before, according to global brand and communications director Tanja Grubner, was a more "radical" approach to research.

To enter creative territory involving

topics that are still taboo – including menopause and fertility issues – the brand had to ensure women’s experiences were at the core before beginning production.

“We already knew we wanted to tell a story about women’s bodies and what women go through from first period to last, and everything in between,” says Grubner. “But, we realised that we missed the language to tell the story.”

Working with strategists from AMV BBDO, this involved questions that were very different from a typical research project. “There were questions asking ‘if your womb was a person or a place, what would it be like?’ Then you got completely different answers,” explains Grubner. “This then informed the creative teams, who said ‘well, if we talk about womb stories, every womb deserves its own story and creative world to bring it to life because everything is so unique’, and this is how they came up with the idea of the womb dwellers.”

Margaux Revol, strategy director at AMV BBDO, says projective techniques were key to avoiding an impersonal approach with the research and helping participants open up about personal, often difficult experiences.

“We gave them projective questions so that they could imagine their own uterus as a person or a creature or a landscape or a soundtrack. This projective technique opened up completely unexpected metaphors and stories that women themselves were surprised by, and it made them realise that they had never examined that relationship before.”

The initial online survey conducted in more than a dozen markets globally consisted entirely of open-ended questions. “The dogma in research is ‘people are bored, they don’t like open-ended questions, people are lazy,’” says Revol. “Actually, we only did open-ended because we didn’t want to put our words in people’s mouths; we wanted to hear their experience, we gave them the tools of projective techniques of anthropomorphising their wombs.”

“We only did open-ended questions... we wanted to hear their experience, and we gave them the tools of projective techniques of anthropomorphising their wombs”

Additionally, to recruit women who had gone through difficult experiences for qualitative interviews, the strategists worked with a storyfinder who usually specialises in sourcing people for documentaries and casting. “Instead of doing quantitative cold research recruitment, we knew we were recruiting based on sensitive questions – it felt like it wouldn’t work to do it in a general omnibus survey,” says Revol.

AMV BBDO also worked with The

Outsiders on the brand’s pain research (see boxout), which primarily focused on interviews with health experts on gynaecological pain, and also drew on projective techniques. “That was the core idea and way of thinking in this campaign, and also fuelled the hypothesis that sometimes when you want to uncover certain truths and insights, you also have to be creative about how you research it, and you can’t just do yes or no questions and multiple choice expecting new results,” says Revol. “That was the whole premise of how we did the research throughout – asking questions in sensitive, interesting, creative ways – you get people feeling like they’re listened to and that we actually care about what they’re going to say, rather than just something quite cold and process-driven that often just gets people to click through, finish and not really engage with the questions.

“Once we started asking questions, women wanted to answer more and more because nobody was asking them those questions, so they were discovering



Misery Roulette by Selby Hi, part of a series of artwork commissioned by AMV BBDO for Pain Stories

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“If you’re not experiencing something, it can often be quite difficult to relate to what others go through, and you need to be very careful with that bias”
●



Inner Wringing
by AMV creative
team Lauren
Peters and
Augustine Cerf,
part of the Pain
Stories project

things about themselves as well.”

Hearing women’s perspectives opened up a “new world” and informed the brand’s next project, Pain Stories (see boxout), according to Grubner, who says the team listened to input from all angles, including individuals working on the project who identified with what they heard from other women about the pain of endometriosis, for example.

When presenting ‘#WombStories’ in another market, the head of marketing there disagreed that the approach was relevant for the region, because they thought the pain shown was “exaggerated”, but another member of the team spoke up to share that it was also their experience.

Grubner says that in addition to helping validate insights further, the encounter also reinforced one of the big learnings of the work. “One of the things we’ve learned is if you’re not experiencing something, it can often be quite difficult to relate to what others go through, and you need to be very careful with that bias. I think ‘#WombStories’ really helped us to become better at listening – not only to consumers but also internally – and to also become better at sharing, because there is so much silence.”

Sustainable shift

Grubner and her team are in charge of six regional brands in the feminine care category (Bodyform in the UK) and looking after brand strategy, comms, digital, sustainability and research. “Category intelligence, shopper insight and consumer insight are very much an enabler for our strategies, and also often a facilitator,” she says.

For example, Grubner’s team works closely with intelligence and innovation teams to identify how trends are developing in a category that was previously very stable but that is now seeing a lot of disruption, with new products including menstrual cups and period underwear.

Consumer interest in sustainability as well as the responsibility of the company as a manufacturer to offer

more environmentally sustainable options have been key drivers for the brand's recent launch of a range of period underwear, Intimawear.

Research conducted in its biggest markets globally, Mexico and Colombia, as well as markets in Europe and Asia, including France, Russia and the UK, found that women reported being unable to treat period days like any other day as they always need additional products, Grubner explains.

"That was one of the insights that led to period pants and what we added from a comms point of view when we launched is that period products have only been designed for five days a month, whereas underwear has only been designed for 25 days a month, so it's been really ignored that women have periods and that their regular underwear is not catering for those specific need days."

While Bodyform works mainly with research agencies depending on the field – Kantar for brand health tracking and Nielsen for product innovation testing, for example – marketers within Essity are encouraged to run their own consumer interviews on a regular basis in various markets globally. For Grubner, pre-pandemic, this involved conducting in-home visits ideally every time she travels for work.

"It opens the door to the women who you are working for, and when they invite you to their home it's really interesting how open they are to share with you, especially in Latin America, where many people live in households with many family members. I'm always surprised how little taboo periods are, because you have your interview partner and then often the kids are around or the grandma and you know they are all listening. In many other countries this would have been a no-go because talking about periods makes them uncomfortable. In Russia this would be unthinkable, for example.

"Those are the things where this direct consumer contact is really important, because it puts all the work in perspective and makes it more tangible and real."



Painful truth

Libresse (Bodyform in the UK) launched the 'Pain Stories' initiative in early 2021 to highlight the gender pain gap and support earlier diagnosis for endometriosis, which takes an average of seven and a half years due to preconceptions that severe period pain is normal.

As part of this, the brand created the Pain Museum and Pain Dictionary to explore experiences with pain.

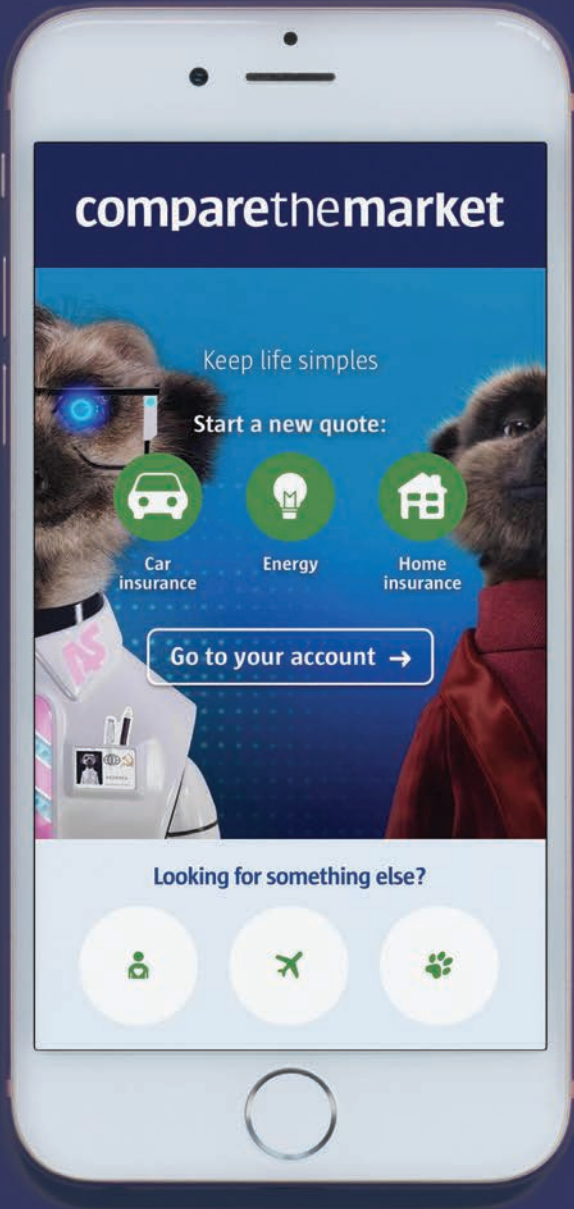
The brand wanted to ensure the initiative was grounded in facts and evidence "coming from organisations other than Essity", says Grubner, so it worked with The Outsiders to carry out research on the gender pain gap to inform the campaign, culminating in the Pain Report.

The report is based on findings from three stages of research conducted across Latin America (Colombia, Mexico and Argentina); Russia; China; Malaysia; the Middle East (Saudi Arabia and Jordan) and Europe (UK, Sweden and France).

The researchers interviewed 33 female or non-binary specialists – including gynaecologists, sexual health experts and physiotherapists specialising in female pelvic pain – and conducted 24 qualitative interviews with women living with painful gynaecological conditions.

Findings added to existing evidence that such women experienced a lack of equality and empathy in workplaces, their personal relationships and in medical consultations where they did not feel heard, either in terms of their pain or their preferred treatments.

Grubner says: "What we saw is that all those who really suffered, for them it isn't dark, it's their reality, and they said 'I feel understood and heard'. That was a really empowering moment for us – we understood that as a brand, we cannot only go into this territory but that we actually have to because nobody else is."



Compare and contrast




Price comparison website Compare The Market was propelled to household name status through its meerkat brand mascots and is now using data to inform its future strategy. By Rob Gray

Brand mascots can be powerful marketing tools, helping position brands and lodge them firmly in the memory. The best of them can stay the course for generations. Bibendum, aka the Michelin Man, first appeared in 1898 and while ‘tired’, is far from tired out. Kellogg’s cheery elvish trio Snap, Crackle and Pop entered the scene to promote Rice Krispies back in the 1930s. Ronald McDonald has clowned around to sell burgers since the 1960s, while the Andrex puppy made its heart-melting frolicsome debut in the 1970s. Within some categories, it’s a case of similar

brand icons going head to head for supremacy; since the late 1980s, Duracell and Energizer have engaged in a battery-powered battle of the bunnies. Among brand mascots launched in the last 20 years, the anthropomorphic meerkats associated with Compare The Market are unquestionably in select company in terms of consumer recognition, having already demonstrated far greater staying power than a pack of AAs since their 2009 launch. The campaign, created by ad agency VCCP, played on the potential for confusion between comparethemeerkat.com

and comparethemarket.com. A dozen years on, VCCP is still on board, while Aleksandr Orlov, the Russian meerkat featured in the first campaign, whose “simples” catchphrase proved to be an earworm of a slogan, is now part of a bigger family of characters. These include Sergei and the ‘meerpup’ Oleg who have been turned into plush toys and whose bios feature on the ‘Meet the Meerkats’ page of the website. Their longevity is no accident. Compare The Market, part of the BGL Group, seeks insights into every piece of brand work and has also conducted



“It works for us that we have a range of rewards for our customers to meet different needs”

consumer research into the toys, which are an important element of its rewards programme.

“The meerkat toys are very popular and I have heard stories in the past of them being sold on eBay for lots of money,” says chief data officer Susie Moan. “But it still varies. There are some customers who are not so interested in that and are much more about Meerkat Meals and Meerkat Movies [part of the rewards scheme], where it’s about a pure money-off approach. It works for us that we have a range of rewards for our customers to meet different needs.”

Moan joined Compare The Market in

Improving bills through online insight

Compare The Market worked with community panel and digital research business Verve to ensure the ‘your bills’ component of its Meerkat app met customer expectations. The service allows users to add accounts across multiple providers so that they can see everything in one view.

Post-launch, Compare The Market wanted a detailed understanding of how customers felt about the tool. The business took a ‘test and learn’ approach, blending online qualitative and user experience (UX) work.

Insight was sought on: What did the ‘your bills’ journey look like, from sign-up to usage? What was intuitive and where were the pain points? How could the platform and overall offer be improved?

The three-stage UX journey research was run with 25 users over three months. Stage one centred on exploratory qual research and featured a two-day pop-up community on initial reaction; stage two was a ‘pulse’ check in on usage and views; stage three looked at the renewals process and the tool going forward.

The research was designed to offer a full overview by including different activities, from blog posts to ‘selfie-style’ video uploads. Taking an iterative approach allowed the team to feed insights back to stakeholders and, based on the discoveries, shape the next phase.

Among the findings were: most people linked the main accounts from which they paid bills; engagement was ‘light-touch’, i.e. mostly quick checks; usage was consistent across all audiences.

Consequently, Compare The Market updated the ‘your bills’ layout to give heightened prominence to areas where customers could save money. Findings also informed new tailored communications that lifted sign-up response.

January 2019, having previously been chief executive of what is now Nectar360, part of Sainsbury's Group, and has a long track record in data-driven insights in the customer loyalty sphere. Stepping into her role two and a half years ago, it was clear from the outset that some change was urgently needed.

As Compare The Market had been growing well, the main focus was on the brands and products it was selling with comparatively little emphasis on understanding and measuring the data being captured. There was no real end-to-end data strategy.

"When I joined, the business hadn't had a data leader for four years or so," says Moan. "And it showed. The team was quite disengaged and didn't have a strong voice in the organisation. The processes and technology from a data perspective were behind where they needed to be. We were more immature in data as a business than I would have expected from the outside as a customer.

"Obviously, we use a lot of data to provide customers with pricing and options when they come on to the

website, but in terms of maturity around customer understanding and what you do with insight and data-driven decisions, it wasn't where it should have been. I have spent the last two and a half years setting out a data strategy – a plan around people, process and technology to mature the organisation – which has involved lots of different things."

An eye on strategy

Pre-pandemic, the team held plenty of physical events, bringing people from different parts of the organisation together to share with them where to find the different data disciplines and how the team could help them answer different questions, from the role of market and customer research to

web analytics. This also entailed working to understand the needs of different stakeholders and educating them on how they could do certain things themselves.

Moan has an extensive remit, overseeing insight and data enablement as well as having additional responsibility for strategic planning and delivery, which she describes as being like a project management office function. Insight is led by an associate director of insight, analytics and optimisation who reports directly to Moan. That team is around 40-strong and covers customer and market research, data science, analytics, and funnel/web experience optimisation. The data enablement team, meanwhile, is roughly the same size and works on data governance, behavioural insight and reporting, data solutions and data portfolio management.

"My budget has grown since I joined a few years ago," says Moan. "Data is a central part of our strategy, and we are part way through a number of big change programmes, so obviously the investment continues."

Change is underpinned by a five-year strategic plan, which is grounded in insight. During strategy development, the team analysed what the platform's propositions should be and the overall horizons for the business. Originally signed-off just before Covid-19 hit, Compare The Market has subsequently conducted a further wave of qualitative research to understand what, if anything, has changed. The research was carried out among a range of different ages and demographics to get a broad view of the potential customer base, and also explored issues such as "fading centres of trust" – institutions that have lost public confidence, such as banks or political parties – to make sure its positioning with customers is spot on.

"The insight for us was around maintaining our impartial voice and not having any kind of bias," says Moan. "Being that fun and engaging brand that can help educate but not overly influence a customer in any one direction."

Closures of cinemas and restaurants

●
"... data is a central part of our strategy, and we are part way through a number of big change programmes..."
●





during lockdown had an obvious impact on the rewards programme. The business also conducted research on delivery options, collection and so on, but the findings proved to be a “mixed bag” with customers showing insufficient interest to spark any significant changes.

A marketing working insight group supports the marketers in their decision-making and there is ongoing work on making sure priority questions are addressed quickly and effectively. Brand marketing already has access to tools like Adobe Analytics, Google Analytics and Power BI so they can self-serve certain answers, but the insight team is continually involved in supporting marketing with more in-depth work. For example, the team supplied data that helped Compare The Market decide to end its *Coronation Street* sponsorship at the start of the year after the best part of a decade.

As one would expect, there’s a good deal of work on the competitive landscape. With input from a competitor intelligence agency, the team produces a monthly overview covering core products like car insurance, home insurance and energy.



That goes out to the business with the option of a deep dive into the findings for product owners and marketers who want to know more.

Compare The Market also has a regular consumer tracker in which it asks a few set questions each month, with ad hoc questions added as necessary. During the first half of 2020, there was also a special Covid-19 tracker, a piece of fortnightly research designed to understand how consumers were feeling and what changes they were making to their spending. Frequency was pushed out to monthly once it was clear the findings weren’t earth-shattering.

Working together

Separately, in May 2021, Compare The Market published *The Uneven Impacts of the Covid-19 Crisis*, a report in collaboration with the Centre for Economics and Business Research on the impact of the pandemic on wealth and financial security. The headline finding was disproportionate financial pressure on households with children, significantly knocking their productivity and ability to save by almost £1,000 a year.

Compare The Market is a division of

BGL Group, which also owns insurance brands like Budget Insurance, Dial Direct and Beagle Street. Moan is quick to stress that these are entirely separate businesses, and no data is shared between the divisions for competition law reasons. That said, things like approaches to data science are discussed between the otherwise separate businesses.

On the data science front, Moan has overseen the introduction of the Databricks analytics platform, which has allowed the team to collaborate on data science. “Until we had Databricks as a platform, they were working on their own laptop, having to extract the data and run stuff by themselves. And you couldn’t pair code or anything like that,” explains Moan. “Having a central platform has accelerated the ability to deliver both models, and value from those models, in the organisation for the team to have a capability that they can work on together.”

Other innovations include a trial with Chattermill on an artificial intelligence-enabled text analysis of a Net Promoter Score survey and the current beta testing of machine learning regarding photo recognition from scanned driving licences. The aim here is to make it easier for customers to fill in a car insurance quote by populating some of the fields with data from a scan.

Moan has also involved her team in corporate social responsibility, with the launch of Data for Good two years ago (now broadened out to CTM for Good) to share data skills that the charity sector may lack. In April, the business held two days during which different teams helped charities with various problems. Participants are encouraged to check back with the charities to ensure their input is perpetuated.

Meerkats are known to be social beasts, and it seems they have a highly developed sense of social responsibility too.

● **Editor’s note: Susie Moan left Compare The Market prior to publication of this article**

The new kings and queens of data

Data is now the fuel that drives business – identifying potential markets, shaping new products, and targeting consumers. *Impact* has partnered with *Significance*, the magazine of the Royal Statistical Society, to jointly publish a series exploring the past, present and future of the data economy. This third part tells the story of the evolution of social media, which created rich and detailed data sources and positioned tech giants as data economies in their own right.
By Timandra Harkness

Until February 2004, a ‘face book’ was a paper directory that US students received to help them get to know each other, with names, photographs and a few biographical details. That was until Harvard University student Mark Zuckerberg had the idea of creating an online version.

Well over a thousand Harvard students signed up within 24 hours of TheFacebook’s launch. Today, Facebook (which dropped the ‘the’ in 2005) claims to have 2.85 billion monthly active users worldwide – more than half the world’s internet users and getting on for a third of the planet’s human population. Total revenue in 2020 was more than \$85bn.

Any platform that attracts an audience of more than a billion people a day could expect to make money from advertising, but what makes Facebook’s advertising space so valuable is the ability to target the right pairs of eyes, and what makes that possible is data.

The ability to gather data from someone’s online behaviour, to build a profile of them and target them with online adverts is older than Facebook or its

social media predecessors MySpace, Friendster and SixDegrees. In 1996, writer Melanie Warner described the now-familiar feeling in an article for *Fortune* magazine: “You sign on to your favourite website and voila! – up pops an ad for Happy Times Cruise Lines... Sure enough, you work in Connecticut, and you’ve been thinking about vacationing in the Mediterranean. But how do they know that? Whoever they are.”

As Warner goes on to explain, “they” are probably DoubleClick, an advertising broker launched in March of that year. By July, it had profiles for four million people, and 25 major websites on its books. “The next time you log on to a DoubleClick site, its software notes your email address, checks out your user profile, and uploads an ad customised for you – within milliseconds of your signing on,” she writes.

Underlying some modern iterations of this advertising system is a process known as real-time bidding (RTB), still used today by companies including Google, which bought DoubleClick in 2008. When you log on to a web page linked to an ad

network, the network's software will parse available information about you from your logins, cookies on your computer, and so on, and create a 'bid request' at an ad exchange.

"On that exchange, different advertisers will bid for the right to fill that space on your website," says marketing analytics consultant Andrew Willshire. "The ad exchange will weigh up all the potential bidders, and whoever has bid the highest will get the right to serve that impression to the viewer. This process happens in thousandths of a second, which is why the adverts look like they are there the whole time to the user."

Much the same thing happens when you log on to social platforms: you'll see content that advertisers have bid for, based on your profile. The difference is that social media sites can know their audience like no advertising platform ever before.

Changing the world?

The advent of social media in the early 21st century was rapid. By 2011, a UK government report estimated that three in five internet users also used social media, up from under one in five in 2007. Market researchers, social researchers and others quickly took notice. The aforementioned UK government report, *The Use of Social Media for Research and Analysis: A Feasibility Study*, argued that "when compared to traditional surveys, social media data offer considerable advantages in terms of how quickly results are delivered, the scale at which results can be brought in, and (potentially) how cheaply they can be obtained".

Jake Steadman was one of the many researchers excited about using secondary data from social media and similar sources. "I probably went in just naively assuming it was going to change the world," he says. After years of working for marketing and research agencies, Steadman went to O2 as its first head of real-time research. (He has since held roles at Twitter and Deliveroo.)

"No-one really knew what it was," he says of his new role. "But it meant they [O2] recognised this new and emerging insight source, which was social data, but they didn't really know how to access it or how to use it. And nor did I, I'd never done it before. But we both decided to take a bit of a leap of faith."

Steadman is frank about his early enthusiasm for social media data. "I think I arrogantly assumed it was going to replace everything," he says. Nor was he alone in thinking that. Consultant Ray Poynter says: "There was probably a lot of optimism around how much we could do with social media data. One of the mantras that people talked about was, 'Why talk to some of us when you can listen to all of us?'"



There is a lot of sense in that."

As Poynter explains, social media presented organisations with the means to listen to "real customers talking about their real experiences, on topics we had not thought to ask about or we had not prioritised".

"It's fantastic at answering questions you didn't ask," he says.

Indeed, there are some questions you would never, or could never, put in a survey. For example, it's easy to find out what sort of products people currently like just by asking them. But, if you want to create a new product, the ultimate goal should be to figure out what people might like in future.

"Take, for example, matcha tea," says Steve King, chief executive of data analytics company Black Swan. Matcha is the green powder used in the Japanese tea



ceremony, prepared by growing green tea in very particular conditions and then grinding it finely. “It really has been around for ages,” says King. But then it began to be drunk in different forms and in different places.

Black Swan’s data-gathering is designed to pick up on the weak signals associated with big data techniques, like a few visitors to San Francisco trying a new drink in a hip café and then raving about it online.

“People start making [matcha tea] and selling it in a cool cafe,” says King, “then the little cool brands start running quite small production lines – higher costs, but a bit more agile. So, you’ll see it in the cool organic shops. From there, it begins to be a slightly larger trend, and then your bigger companies pick it up – and the joy of data is that you saw that whole thing.”

Social media data is good for identifying long-term trends, and innovations that straddle contexts. However, says Poynter, there are still questions that are better answered by researchers doing the asking. Hypotheticals, adverts or products that don’t exist yet can’t be tested by passive observation of electronic word of mouth.

Of course, no matter how many social media users rave about a product like matcha tea, it is unlikely that these views are representative of the broader population.

As Steadman ultimately discovered, after the initial giddy wave of social media enthusiasm had passed: “O2, like every brand, did segmentations, and brand measurement, and customer experience measurement and all those kinds of metrics. Social data sits alongside those. It doesn’t replace them; it augments and adds cultural context. But you still need to have statistically robust measures in place.”

Even Black Swan, whose focus is social media data, combines the latter with other forms of secondary data, and surveys, to get a multi-dimensional picture. But for King, social media data has advantages over surveys, because you don’t influence responses by the way you ask the questions. “By going bottom-up rather than top-down, you’ve got more granular data that allows you to build models, and then build algorithms and prediction,” he says.

This mix of big-picture and granular detail also appeals to statistician Simon Raper, founder of Coppelia Machine Learning and Analytics. He uses the example of viewer recommendations for a streaming service. “If I want to understand what the average customer is doing, or something broadly about viewing patterns, I can just take a sample and I don’t have to go crazy on the big data stuff.” But, he says, “the huge amount of data is going to make it possible for me to answer questions about some niche viewing, like Japanese horror.”

Raper likens it to a pixelated image. “If you’ve got a picture of a crowd, a low-resolution picture doesn’t really matter if you just want to make out the shape of the crowd, or groups within it. But if you want to zoom in on someone’s face, then you need a really high-definition image.” It’s almost “paradoxical”, he says, that one of the things we can do with enormous amounts of data and processing power is to focus on the smaller details.

The privacy question

The capacity to zoom in on the individual brings us back to one of the most powerful, and disquieting, aspects of social media – especially when it is being used by the same platform to collect data and to target advertising. Though the predictive strength of data

such as Facebook ‘likes’ has been overstated, we undoubtedly share more unsolicited information about ourselves, in digital form, than any humans before us.

Add to that the capacity of analytical algorithms to combine datasets, to find statistical relationships and to infer interests and demographic details from other data, and market segmentation turns into microsegmentation.

In November 2012, *The Guardian* reported how Barack Obama’s re-election team “used cookies to service targeted digital adverts to voters’ computers, honing the message according to the individual’s age, gender, occupation, interests and voting history”.

Yet microtargeting came to be viewed somewhat less favourably after the successful Brexit campaign in the UK and Donald Trump’s election as US president in 2016.

Cambridge Analytica, which claimed to be able to combine data profiling with psychological profiling techniques, became the focus for a new awareness of how political campaigning uses social media data. Although the Information Commissioner’s Office (ICO) concluded that Cambridge Analytica was not involved in the UK referendum on leaving the EU, Facebook was fined £500,000 by the regulator for failing to protect its users’ data from misuse.

While the majority of internet users continue to use social media and other apps that track and profile them, half of US adults report having avoided a product or service because of privacy concerns, according to April 2020 Pew Research Center research, and in the US and UK, tech companies have been called to account by elected politicians.

One response to increased customer concern and regulation has been for social media companies to monopolise the data they collect. “Facebook in particular has become very, very reluctant to sell information,” says Poynter. And to the surprise of some, the tech giants have also been willing to change their data-gathering habits, even to go beyond what the law demands in some cases. Google, for instance, has proposed to block third-party cookies – the type used to track internet activity and target ads – from its Chrome internet browser from 2023 (a number of rival browsers already do so).

“I think everybody was surprised, including the people working at Google, that Google basically did more than it needed to do for GDPR [the General Data Protection Regulation],” says researcher Simeon Duckworth. “Everybody imagines, if you take away cookies, the internet will fall apart. Now Google has actually gone and said that it will do that.”

Duckworth is sceptical that data-based profiling and targeting is always effective, especially for large

advertisers who want to reach a mass audience: the extra expense of tools like microtargeting and A/B testing to refine a marketing message may not be justified by extra effectiveness. Small and niche advertisers are most likely to see results from narrowing down their target audience, but they’re also less likely to be able to afford it.

For this reason, Duckworth does not think that tougher regulation will destroy the business model of digital advertising. “It’s not going to kill the internet, but it is going to redistribute it towards bigger platforms, bigger publishers away from the smaller ones,” he says. Large companies like Google and Facebook will have the scale to work within new laws using new techniques. Smaller companies will lose access to data and the benefits of targeting a niche audience.

So, what is the future of the data economy? A fairer, more transparent, less manipulative internet environment? Or simply one in which a handful of big tech companies run the show, and smaller players go under or sell out? The final article in this series will seek to answer these and other questions.

● The fourth part of the series will be published in the January 2022 issue of *Impact*.

Timandra Harkness is a presenter, writer and comedian, and author of *Big data: does size matter?*



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Going nowhere fast: more than 20 years after the dotcom boom, the UK's flagship index, the FTSE 100, is still hovering around the 7,000 level reached at the end of 1999, while in the US the S&P, Dow Jones and Nasdaq hit new record highs daily.

Why so? At first, Brexit and then Covid-19 deterred buyers, but now with interest rates still at historical lows, there is a bid a day for UK public limited companies by private equity players and trade buyers, who view it as undervalued against other global markets.

Is it a question of ownership? The explanation for the London market's discount lies in the predominance of slow-growth old economy stocks in the FTSE index – banks, oil and gas, mining – and the near-absence of fast-growth digital tech companies. It is also because of the ownership of the market by pension funds and insurance companies who demand progressive dividend policies from established blue-chip companies to meet the long-term liabilities of their customers, the pensioners. So to please their institutional shareholders, these companies over-distribute the cash they generate rather than investing it for future growth and often, instead, make highly-priced acquisitions for equity that are welcomed as long as they are accretive in the first full year of ownership.

As we all know, things largely go wrong after the honeymoon period, but woe betide the management team that makes a dilutive acquisition. So highly-priced accretive acquisitions for quick, short-term gains are preferred to painstaking, long-term investment for organic growth. Why so? Is it to do with the fact that fund managers themselves are judged and evaluated – and importantly, rewarded – on short-term quarterly and annual performance?

The person on the street is no fool: meanwhile, fast-growth, disruptive tech companies do not ordinarily pay dividends and instead reinvest cash to turbo-charge organic growth that is highly prized and highly rated far above dividend-paying stocks. In the US, the market is predominantly owned by retail investors in their 401(k) pension plans who prefer capital gains to income,

not least because gains are not taxed until withdrawal at retirement. Similarly, since the Pensions Act 2015, more UK stakeholders have taken their gold-plated defined benefit pensions out of their company pension schemes and placed them into personal self-invested personal pensions (SIPPs) where they, too, are buyers of growth stocks. Needless to say, the lowest interest rates in human history have buoyed all asset prices – bonds, commodities, property, equities – but none more so than fast-growth companies.

The regulator rides to the rescue: in an attempt to bolster the London market and to keep exciting growth companies at home, the UK listings review is looking at changes to the listings rules, including around dual-class share structures and free-float requirements. It is likely that companies with standard listings will ultimately enjoy the same status as the premium listed, including inclusion in the FTSE 100 index, which will encourage

UK fund managers to invest in disruptive technologies. This may even revive the FTSE 100 when entrepreneur-led companies such as The Hut Group and S4 Capital become eligible for inclusion in the coveted index.

If you can't beat 'em, join 'em: the short-termism of the City is perhaps best exemplified by Daily Mail and

General Trust's (DMGT's) planned sale of RMS, its insurance risk modelling business, to Moody's, for twice the highest valuation attributed to it by analysts on a sum-of-the-parts basis or on break up – £1.425bn versus £700m. The long road to DMGT's own transformation and take-private began in May 2018 with the sale of Zoopla's parent company to Silver Lake for £2.2bn, followed in March 2019 with the distribution of 49% of Euromoney to its shareholders, which increased the Rothermere family's stake in DMGT from 24% to 36%. It will culminate in the distribution of 610p cash per share from the sale of RMS, along with DMGT's successful US listing of used car business Cazoo and, finally, the company taking its original newspaper and events business private. Who said you can't sell high and buy low at the same time? You just need skin and soul in the game.

●
“The lowest interest rates in human history have buoyed all asset prices... but none more so than fast-growth companies”
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Charitable deeds

Why do people give to charity? A recent study analysed the link between people living with cancer and those who donate money and time.

By Katie McQuater

Cancer charity Macmillan had a hypothesis that one of the major underlying drivers of fundraising behaviour was the 'give-get relationship' – the notion that people who receive help and support, or see others receiving it, from the likes of Macmillan will then go on to donate, creating a self-fulfilling cycle.

This hypothesis prompted a research project with Boxclever that combined analytical modelling and qualitative research to explore the concept, and whether the charity's work and awareness of it is a key factor in prompting donations.

In an initial ethnographic stage, researchers explored the idea of the 'give-get relationship' and helped to define it using in-depth sessions and interviews, initially with people living with cancer and their immediate families.

The qualitative team then sought out individuals in the social circle of those living with cancer – close friends and colleagues – to understand more about what they termed the 'cancer network' and investigate the experience of those who are one step removed from the individual experience of cancer.

"The qual work really helped us understand what was going on in people's lives and how their experiences with charities were playing out, and resulting in charitable behaviours back to those charities," explains Sam Gardner, director at Boxclever.

The company also ran a market sizing exercise, conducting an online survey to quantify how many people in the UK are living with cancer and how many are close to someone living with cancer, finding that the majority fall into a category of those who are affected by cancer, with a small proportion living with it themselves, says Gardner.

A third stage involved another survey with around 4,000 respondents, which focused only on those living with cancer or affected by it, and captured more data on how much people had donated and how frequently. Boxclever then used this to build analytics models to understand what drives donation behaviour.

The company used logistic regression to understand how much more or less likely people are to donate given a range of factors, including demographic factors or whether they're suffering from cancer themselves.

One of the findings of the modelling was that those living with cancer, along with people in their immediate family, are less likely to donate to charities. "Initially, it felt like a counterintuitive finding, but that was where the qual came in to help us understand and explain that people who are one step removed need an outlet and some way to support, whereas those who are living with cancer or in the immediate family are just so wrapped up in the day to day," explains Gardner.

The researchers were able to conclude that a significant majority of donation behaviour was driven by the 'give-get relationship' and pinpoint what types of interactions with the charity or elements of its support services drove a heightened propensity to donate.

"There was a big hypothesis that the Macmillan nurse would be a big driver, and this was, but there were other things that were equally powerful – for example, simply visiting the Macmillan website and seeing all the support materials for people living with cancer was a big driver of donation behaviour."

Integrating qualitative research helped the analysts to understand the modelling results from a human perspective, says Gardner. "What we showed through qual was how profoundly people who are one step removed from the cancer experience are affected by seeing friends or loved ones go through cancer, and also how powerless they feel."

Demonstrating the value of the 'give-get relationship' and developing a simulation model to predict the likely outcome of different campaign strategies helped the charity to understand more about the return on investment of different approaches, says Gardner.

For him, the project reinforced the value of analysts and qualitative researchers working in lockstep. "There's a tendency for analysts to be siloed from qual researchers. Personality-wise, we're different breeds of people and it's a real shame because when you get the two together and take a little bit of time for the analyst to explain to the qual researchers what the modelling is doing and vice versa, you get to a more powerful outcome. The qual team can really articulate things in a way that statistical people just can't, so the two together is so powerful. As an industry as a whole, we need to take the time to try and bring both disciplines together."

Analytic bias



Bias in data analytics is a broad subject, but an important one that I want to address to ensure that we manage bias effectively within the analytics industry. This is because I believe there will be a more public debate on how perceived data bias impacts groups of people, and we need to be ahead of that conversation.

Data analytics has been at the forefront of the national news throughout the pandemic. One of the more challenging areas connected to analytics was the proposed use of algorithms to estimate the exam results of children in 2020. In principle, using predictive modelling to replace exams was not a bad idea. As questions were raised on fairness to pupils, however, the algorithm was dropped and replaced with teacher predictions.

The proposed approach brought to the public conscience the idea of bias in data-led algorithms and the negative impact it can have on a large community of people. There will, of course, have been some potential bias in the teacher-based results, but it is the direct link to data algorithms – and their use in large data sets – that will raise questions.

This is a reminder that, as proponents of analytics, we have a duty to continue to try to address the challenge of bias to ensure the best results. It is not a new issue for our industry. I, however, would like to think our research samples are selected carefully, and we collect the right data for the job to ensure we deliver quality recommendations. Despite that, there are specific areas of potential data bias, of which I believe we need to be cognisant.

As a male analytic director, I am aware of the danger that how I lead my team may come with my own unconscious bias. The role of unconscious bias in data analysis is a watch out, and was brought to my attention further recently after reading *Invisible Women* by Caroline Criado Perez. The book brings to life several observations of analytics where women are potentially

disadvantaged because of predominately male-led, data-based decisions. The point is that we can strive to address this type of bias from whatever position we hold in our industry.

I recall, several years ago, many a visit to a shopper insight director in Cheltenham. On the wall was a statement, ‘90% of stores are designed by men, 90% of shopping trips are taken by women’. I am not sure about the source, but it has always served as a reminder to me that I must ensure we have the right mix of minds and instil the importance of diversity when building teams working on a project. Let us challenge ourselves on the personal bias that we might bring. It is a sign of leadership to step back, and accept the input and challenge from others to deliver the rounded approach that removes bias where we can.

The second area to address is how we deal with confirmation

bias. Many of us work with internal customers or clients who want data to tell a specific story. We must be prepared to spend time on how an analytic approach is built to provide results with integrity. I have worked on many projects relating to media or promotional evaluation of food or drink items where the exclusion of a simple variable, such as weather data,

could lead to misleading results or misattribution of campaign success. We must control the data inputs to build the best analytic approach with the data we have available. That might mean pushing for more information to input into our model because we know it will make a difference to removing a biased result.

Facing up to bias is an industry question, and as artificial intelligence grows, so too do the questions on how algorithmic bias impacts results. There will always be something in any analytic approach that can be challenged, but being aware and sharing our thinking will mean we can protect the reputation of the data analysis, drive out the unconscious bias, and deliver great outputs that secure the role of analytics as a ‘go to’ place for our organisation’s issues.

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“Let us challenge ourselves on the personal bias that we might bring. It is a sign of leadership to step back and accept input from others”
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Losing meaning

Complicated product terms are not a new thing. But could they be putting off consumers? By Liam Kay

Imagine the scene. You enter a restaurant, sit down and open the menu. Two options jump out at you. The first, steak, chips and bearnaise sauce. The other, wild orecchiette with invigorated aubergine sliders and market sungold. There is a good chance that your order would come medium-rare.

Meaningless terms are littered across the restaurant trade and are commonplace in numerous other industries too, as a way of showcasing premium products or making them more enticing to customers. A recent study examined the impact these terms have on products' success, and found that in many cases

they were actually off-putting to the majority of people.

The paper, *Meaningless Descriptors Increase Price Judgments and Decrease Quality Judgments*, examines the difference between 'meaningful' product descriptions (those that provide clear semantic meaning or context) and 'meaningless' descriptions (which are not understood by consumers either in isolation or in context) on potential customers' price judgements and subjective quality expectations.

Ernest Baskin, co-author of the study and researcher at Saint Joseph's University in Philadelphia, says the genesis for the research came from a visit to a restaurant. "We were looking at various items on restaurant menus, and how they were named," he laughs. "We were talking about how we are relatively educated people, but we had no idea what some of the menu items



were. We got to thinking ‘OK, if we don’t know what some of these items are, many other people probably also don’t know what these items mean’.

“We thought this might be a cool project to study, where we look at words on menus that you do not already know what they mean and how they affect your perception of the restaurant and the dish.”

The research team carried out four experiments to examine the impact of meaningless terms. The first saw 299 participants randomly assigned to two groups, one examining a random meaningless descriptor added to a staple food, and a control just including the staple food term. The next experiment had 202 participants and examined the use of random meaningless descriptors in four non-food everyday items: a ballpoint pen, a neck pillow, hand soap and facial tissues.

The third experiment had 203 participants and asked each to evaluate both fried chicken and a glazed doughnut, with one group provided an additional randomly generated meaningless term before the item, for example, ‘zal-fried chicken’. All participants were asked whether they associated each meaningless descriptor with any positive or negative meaning and asked to give them a numerical rating.

The final experiment saw 402 participants asked to think of a friend who is either very unconventional or very conventional, and then to imagine buying a bakery gift certificate for them based on the description of a glazed donut, some of which included meaningless descriptors.

The results broadly showed that when meaningless terms were used, people thought the item would be more expensive. However, they also thought the item would be of a lower quality than products with more straightforward and easily understood descriptions.

“In the restaurant industry, there is this overall idea that if you make something sound cool and untypical, that is automatically going to, in all cases, be better for your restaurant,” says Baskin. “This research shows that is not always the case. In many cases, when you see an item on a menu, and you don’t really know what it is, based on an adjective, you think it might be more expensive and that it might not be an item for you. That might even prevent you from going to the restaurant to experience the item.”

The trend is primarily seen among utilitarian items that are commonly known, such as fried chicken or a ballpoint pen. Complicated additional terminology that the consumer does

not recognise risks making them imagine a weird version of the commonplace product. “They are unlikely to like it,” Baskin adds.

However, this might not be applicable to every industry – technology is an area where numerous terms that are alien to the average consumer are in everyday parlance. The research paper suggests that technology is one area where meaningless descriptors might increase price judgements without decreasing quality expectations or hurting purchase intentions.

Much depends on the target audience. The research suggests that complicated and uncommon terms will not work with a broader customer base. People do not have the ability to taste a product before going to a restaurant, and often have to judge a location based on the information contained in the menu. More bizarre names might therefore not be the best strategy, depending on the likely customer base.

“It really depends on the segment you are targeting,” argues Baskin. “You can succeed as a restaurant targeted towards a high-end foodie. They will be familiar with the terminology, and it doesn’t necessarily put them off.

“The key comes when you need your audience to be a little bit broader, and you want to bring in folks who are not ensconced in foodie culture and are less likely to know what these words mean. That is the dilemma the restaurants are in.”

Outside the food industry, the research raises the question of how language is used to describe products, and whether simpler wording could be more effective at showcasing an item’s quality to its intended audience. Baskin says that the next steps are to consider other types of descriptors, and the impact they could have – for example, how language and linguistics in marketing can affect product success and desirability.

“Language is really important, and you need to know whether people are going to understand what it is you are trying to sell them,” says Baskin. “If they don’t understand, they are going to make assumptions. This work says that if they don’t understand at all and have no associations, they will make negative assumptions.” It appears that for many consumers, simplicity is key – if your product is good, do not overcomplicate. The classic dishes and descriptions are often ‘classic’ for a reason.

● Ernest Baskin, Peggy J. Liu, *Meaningless Descriptors Increase Price Judgments and Decrease Quality Judgments*, *Journal of Consumer Psychology*, Volume 31, Issue 2, April 2021

Cue action!



As researchers, we often explore the context around the product, service or consumers we are researching. New research on understanding the science behind habits and routines has given us another concrete reason to explore context – how analysing the types of cues prompting a routine behaviour can indicate how strong and well-embedded a routine might be.

Significantly, not all cues are equal. There is a plethora of behaviour-change interventions in trying to build a new habit, many of which have limited success, especially long term. Having a clearer understanding of which cues are likely to be effective could inform interventions to help people select the cues that best fit their context and, so, ensure a strong habit is built.

We already know that establishing cues – background reminders in your surroundings that automatically make you think ‘aah, I need to do x or y’ – can be an effective way to prompt and build a new habit or routine.

When we consistently perform a behaviour upon encountering a specific cue in our context, it reinforces the association we have between that cue and the behaviour. As these associations strengthen, the behaviour happens more automatically and habitually as our control over the new behaviour shifts from the conscious, intentional and memory-based parts of the brain to the non-conscious parts of the brain.

Not all cues are equal

Qualitative research by Katarzyna Stawarz and Benjamin Gardner, psychologists at Bristol University and King’s College London respectively, has explored what makes an effective strategy for cueing simple habits. Previous research by Gardner on establishing habits has already found that, left to their own devices, people often pick suboptimal cues, failing to be specific enough or trying to include too many behaviours in a single plan.

In this new work, Stawarz and Gardner have explored how people build a new habit. They recruited 38 young people to make taking a daily vitamin C tablet a habit over the course of three weeks. Crucially, they were given no guidance on how to build the habit. The research explored how people responded through a combination of in-depth, semi-structured interviews, one at the start and another at the end of the study; and two

evidence-based structured questionnaires (one to measure memory ability and another to measure the strength of habit), together with in-context photo submissions of where participants kept their tablets. Adherence was primarily determined based on participants’ self-reports of forgetting.

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“When we consistently perform a behaviour upon encountering a specific cue in our context, it reinforces the association between the cue and the behaviour”
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Most participants took their tablets roughly the equivalent of five times per week, or 71% of the time. Scores from the habit-strength questionnaire, taken at the end of the three-week period, showed a weak habit had started to form for 11 of the participants.

The final interview focused on: participants' experiences of attempting to take vitamin C tablets, including their remembering strategies; their rationale for selecting specific cues; the ease of remembering; the reasons for forgetting; the role of visual cues; problems with existing automatic behaviours; and the differences between initial plans for remembering vitamins and the actual strategies used.

Good and bad cues

The research identified some simple flaws in how people approached the task, such as choosing strategies they had used before, regardless of whether they had worked or not, and having very vague plans.

Many experimented with a whole wealth of cues, using trial and error to work out what worked best for them, and this tended to

take a couple of weeks. Many participants used multiple cues, keeping them in a specific location (by their bed or on their desk were common) and piggybacking taking the tablet with an existing routine, giving them a specific time cue as well. For example, after morning coffee or brushing teeth, or after medications they were already taking.

Stawarz and Gardner's analysis enables us to identify a strategy for building optimal cues for a new habit:

- **Choose multiple cues:** choosing only one cue meant people were vulnerable to forgetting. For example, one participant placed her tablets in her bag with her laptop charger, but found there were some days when she didn't take the charger out of her bag. Participants who relied on multiple cues tended to be more successful at remembering.
- **Stable context:** participants who picked a stable context that they were likely to encounter every day had more success taking their tablet. Those who chose unstable contexts, which could change from day to day, had less success. One participant kept their vitamins in their jacket pocket, on the basis that hearing the bottle rattle as they walked would prompt them to take the tablet, but failed to forecast how this strategy might be easily overturned – when they chose to wear another jacket if the weather changed, or if they didn't leave the house.
- **Narrow time slot:** participants had less success when they didn't specify a rough time slot in their daily routine, relying on a vague strategy of 'I'll take it when I see it'. The problem with this is that we adapt to visual salience; we get used to what is in our vicinity and gradually stop noticing things. Not only did this mean they sometimes forgot to take it, but they also couldn't remember if they had already taken it or not. In contrast, participants who picked narrower, more specific time slots – such as 'after morning coffee' or 'after alarm clock' – tended to do better.
- **Piggybacking to an existing routine:** many participants tagged it onto an existing routine, such as taking it with their contraceptive pill or after brushing their teeth. This is borne out in previous research – connecting the new habit to an established routine can make for a very strong habit cue.

Those who built successful habits used multiple cues, picked out a stable location, a narrow time slot and often piggybacked the new habit to an existing one. Those who were most specific about their cues, and made them unique, tended to have the most success.

For researchers, in-depth qualitative research such as this helps us understand why we need a deep contextual understanding to explore potential cues, and how we might analyse habitual behaviours or the failure to develop a strong habit. For behaviour-change practitioners, in-depth qualitative research delivers powerful insights into how we might help people build stronger daily habits, offering a clear strategy for how to design and leverage the cues most likely to have success, or helping people develop their own personalised action plan.





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Since 2019, the Market Research Society has been working with a group of research employers to develop a research apprenticeship, following the introduction of a government apprenticeship levy applying to all employers in England with an annual pay bill of more than £3m.

After years of work from the trailblazer group, the market research executive apprenticeship is set to launch in 2022. Louise Maycock, head of talent at Ipsos Mori, who has chaired the group since it was formed, says there was a gap in the industry for an apprenticeship covering core research work.

“There was no core research apprenticeship available, therefore there was a big gap in our industry to bring in apprentices to do our core work,” says Maycock. “For example, in Ipsos, we bring in project management apprentices and business admin apprentices, but they can’t work on the core of research with clients during the apprenticeship because the apprenticeship

standards have to be very closely aligned to the work you do, as it’s vocational and you have to demonstrate the work you do. So, we had a big gap in the industry in our core market research.”

The group, which has more than 20 members, including Channel 4 and Disney, worked collaboratively to create the standard knowledge, skills and behaviours required, explains Maycock.

“We had to work together to create and agree what we thought the knowledge, skills and behaviours of a market research executive are, and make sure that they applied across all sectors – agency side, client side, public sector, private sector, charity. We had to make sure all the things we included as competencies could be achieved by a market research executive working in all sectors, so that took a little while to agree, create and work through.”

The group has created an end-point assessment plan and worked to find a training provider that could produce a training plan against the assessment, which will be piloted

Learning on the job

The market research sector’s apprenticeship is set to launch following more than two years of work from a group of industry-wide trailblazers. By Katie McQuater



with a few apprentices from this autumn, before launching in 2022.

Making sure the standard was applicable and achievable for apprentices across the board was challenging, says Maycock, as was disruption caused by Covid-19, with the group unable to meet in person or focus as much time on developing the apprenticeship.

Industry application

At Ipsos Mori, Maycock says the apprenticeship – a Level 4 qualification aimed at people who have done A-levels – will be used as an alternative entry point for new recruits. “We are traditionally a graduate employer and have a big graduate scheme, so we are working on how we create a really strong apprenticeship programme to complement our grad scheme.

“Our graduates join and in one year they become a research executive – for our apprentices, the programme will be 18 months. We will recruit people in the same way, but they will not have gone to university, and they will become a research executive in 18 months, instead of 12.”

Attracting a new talent pool to the industry is increasingly important in a post-pandemic jobs market because of the other options available to young people, says Maycock.

“The opportunity to bring new fresh thinking into our industry as opposed to others; it’s a real requirement now because of the way the world’s changing.”

Ipsos Mori’s experience of taking on apprentices to date – in areas such as project management – has been that they tend to be from more diverse backgrounds than those joining through the graduate programme.

For Clare Bamberger, head of insight at the House of Commons and a member of the trailblazer group, it’s important for the research industry to have apprenticeships because of the increasing demand for quality insight for decision-making.

“It’s not an obvious career path, so having an apprenticeship can attract a new diverse pool of candidates who will better be able to represent the audiences and understand the products and services they are researching. Not needing a degree to start is an important step – this is open to everyone, provided they meet the criteria,” says Bamberger.

“Market research is not just one thing. The

spread of sectors and specialisms in market research is very wide, so the more we can upskill people early in their career with a variety of career paths to choose from, the better we can attract and retain talent in the industry.”

Less traditional route to research

“An apprenticeship isn’t for everyone, but it worked incredibly well for me,” says Amanda Hammond, research executive at Opinium, who left school after sixth form to begin her career as a research apprentice at ITV. “If I had carried on with my A-levels and gone to university, I would have only graduated last year. Instead, I’m almost five years ahead of my peers in terms of contacts, experience and salary.”

Hammond feels apprenticeships are important for the industry to foster greater diversity and offer different perspectives.

“Our entire industry is built on understanding people and what they think, feel, and do – but to truly understand our environment, our workforce

needs to be as diverse as possible. “Apprenticeships can provide those

different perspectives and allow people who may not be able to access our industry via the traditional routes (for example, internships or graduate programmes) an entry point. I hope the creation of this scheme means that apprenticeships in

research will be viewed on the same level as university education, because the work we do is so diverse, and our workforce should reflect that.”

In order for the apprenticeship to be successful in redressing the industry’s lack of diversity, take-up should be encouraged from under-represented groups, says Hammond. “To do that, we need to educate people about this brilliant opportunity, in particular those in sixth form and college, so market research becomes as highly considered as other marcomms industries like marketing and advertising.”

Maycock concurs, saying that the next step once the apprenticeship has launched is promoting it. “We need to make sure people know that it exists – we need to work with schools and other organisations to get the word out there that we have this opportunity in the industry that people may not know about. I think that’s the challenge – how to publicise and communicate this in the right places to get people interested in research as a career.”

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“Attracting a new talent pool to the industry is increasingly important in a post-pandemic jobs market”
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Essential safeguards: mental health



The MRS standards team has continued to add to the essential safeguards series of guidance, with the aim of guiding our members in the prevention of harm, a key construct of the MRS code. The latest addition to the series covers mental health.

One in four people in the UK will have a mental health problem at some point. While mental health problems are common, most are mild, tend to be short term and are normally treated successfully, with medication, by a GP.

Mental health is about how we think, feel and behave. Anxiety and depression are the most common mental health problems. They are often a reaction to a difficult life event, such as bereavement, but can also be caused by work-related issues.

The impact and experience of the Covid-19 outbreak has been different for everyone – as has how we have reacted – but there is no doubt it has been a really difficult time for us all. Increasingly in these strange times we find ourselves living in, participants are commenting that they are suffering from depression, express an intention to self-harm, or are even considering taking their own life. More and more of our members are contacting the confidential Codeline advisory service to ask how they can help in these situations, so let us explore this further.

Scope of guidance

The guidance aims to help practitioners identify the signs of anxiety and depression to assist in their professional activities. The relevant clause within the MRS Code of Conduct (2019) is MRS Code Rule 9: *Members must take all reasonable precautions to ensure that participants are not harmed or adversely affected by their professional activities and ensure that there are measures in place to guard against potential harm.*

What is anxiety and depression?

Anxiety

This is what we feel when we are worried, tense or afraid – particularly about things that are about to happen, or which we think could happen in the future. Anxiety is a natural human response when we perceive that we are under threat. It can be

experienced through our thoughts, feelings and physical sensations. Some symptoms of anxiety may include:

- Feeling restless
- Being agitated
- Struggling to sleep and eat.

Many people feel anxious at times. It is particularly common to experience some anxiety while coping with stressful events or changes, especially if they could have a big impact on your life.

Depression

Depression is a low mood that lasts for a long time and affects your everyday life.

In its mildest form, depression can mean just being in low spirit. It does not stop you leading your normal life, but makes everything harder to do and seem less worthwhile. At its most severe, depression can be life-threatening because it can make you feel suicidal. Some common signs of depression:

Appearance:

- Down, upset or tearful
- Restless, agitated or irritable
- Hopeless and despairing
- Suicidal.

Behaviour:

- Self-harming or suicidal behaviour
- Difficulty speaking, thinking clearly or making decisions
- Difficulty remembering or concentrating on things
- Moving very slowly or being restless and agitated.

What can be done?

Mental health issues can be a fluctuating characteristic that may not necessarily be obvious at first glance. If it is known that the topic of the data collection is likely to cause distress, it is advisable to take steps to address any adverse effects that may occur.

What should you do if a participant describes a mental distress – for example, a participant comments about suffering from depression, self-harming or mentions having suicidal thoughts?



Prepare – be able to provide helpline numbers, charity details and any other information that can offer support and help.

Assist – offer to put the participant in touch with individuals or services that can provide support and help. Bear in mind that this must only be done with permission of the participant – they must agree what will be revealed, to whom and for what purpose.

Be aware – learning of others’ mental health issues can be distressing to hear. You may need support as a practitioner when these issues emerge in your professional activities. Talk to someone, such as a colleague or a workplace mental health adviser – it is often helpful to share such experiences.

A final thought...

Easing of Covid-19 restrictions will allow us to get back to the people and things we love, but it is important to remember that some participants may be worried about taking part in face-to-face data-collection activities. Even positive change can lead to anxiety, and it can take time to readjust to things we have not done for a while. Always ensure that participants are not pressured to take part and that a participant’s right to

withdraw from a project at any stage is respected. Don’t forget to regularly check the MRS website for any updates to the guidance for face-to-face data collection.

Feelings of post-lockdown anxiety are likely to pass with time, as we get used to the ‘new normal’, but it is important to do what we can to take care of our own and others’ mental health.

Charities, helplines and communities

Anxiety

Anxiety UK: anxietyuk.org.uk

Mind: mind.org

Time to Change: time-to-change.org.uk/

Depression

Living Life to the Full: lltff.com

Samaritans: samaritans.org

Rethink: rethink.org

Under-19s can speak to Childline: Call Childline on 0800 1111 or visit childline.org.uk

Hub of Hope: hubofhope.co.uk

Reading Well: reading-well.org.uk/books

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Beyond borders

Last month, MRS issued its annual review for 2020/21. As with all tumultuous periods in history, we can already see what wasn't apparent then: the emergence of something new and – in some areas – better than what existed before.

While it's too soon to draw many conclusions, I am certain that not only did the research sector respond admirably to the challenges, but we were also active in finding solutions, adapting to the unknown and, ultimately, redefining our value to business and society. However, I sincerely wish the circumstances that have allowed our sector to shine were different.

Looking forward, MRS is expanding its focus beyond the UK and Ireland. We are now delivering online training and events, best-practice guidance and industry news to a global audience, every hour of every day. That's why international brands and agencies – recently TikTok, John Lewis and that most international of organisations, Nato – feel well served by our International Affiliates scheme.

The scourge of Covid-19 has had one benefit that we must seize and not waste. It has inadvertently highlighted many

inequalities in our societies. I am a firm believer that the research and insight sector is a critical lever to help drive fundamental changes in how we live and how we value the planet, and one another. Organisations such as your own and MRS are increasingly taking a leadership role in addressing these inequalities.

That's why we launched the MRS inclusion pledge in 2019, followed this year by the net zero pledge. So far, more than 100 companies have signed up for one or both.

In December, you must look out for the publication of the *Research Live Industry Report 2022*. It includes the MRS League Tables, gender pay gap reporting, and client views on the year ahead.

Thank you – our members and company partners – for your role in helping our sector rally against adversity. I would also like to thank all those sponsors and advertisers that support us financially, and the many professionals who sit on our various boards, committees and groups giving so much of their time and expertise.

Stay well, and I look forward to working with you in the years to come.

Sector and MRS news

Research Heroes

To mark our 75th anniversary, MRS has published the first set of 25 Research Heroes as part of a programme to spotlight heroic individuals in the research sector. The list includes people – in both client-side and supplier-side roles, spanning functions from operations to account management – who are working to make a difference. See the latest list of heroes at research-live.com

Net zero pledge signees

Since its launch in June, more than 35 research organisations have signed up to the MRS net zero pledge. This manifesto for sustainability asks CEOs to make four commitments towards ensuring that their organisations are net zero by 2026. Signees of the pledge are required to be an accredited company partner. There will be a range of events in the autumn on sustainability, including the Sustainability Summit and a webinar sharing best practice on how to get to net zero.

For more information, visit mrs.org.uk/topic/sustainability-in-research

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.

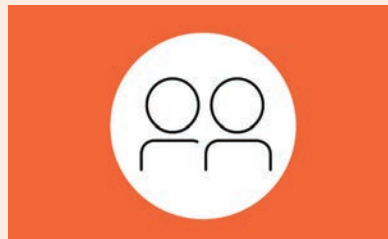
Code of Conduct



Demonstrate your adherence to research standards

For 60 years, the MRS Code of Conduct has been the foundation of good research practice, setting out the professional standards that all practitioners must maintain. Being a member ensures that you are recognised for your commitment to these principles. The current edition of the Code of Conduct has been operative since 1 October 2019, and was revised to encompass the requirements of the UK's Data Protection Act 2018 and to include a broader selection of data-collection processes.

Mentoring scheme



Give your career a boost with our mentoring scheme

Our specialist mentoring scheme 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 – and the MRS scheme is designed especially for research professionals. As a member, you can apply to be a part of the mentoring scheme, where members are matched with an experienced senior professional. There are currently more than 100 active partnerships.

Specialist networks



Sign up to a range of specialist interest groups and networks

As a member, there is a wide range of special interest groups with which you can get involved. If you are analytically minded, you can sign up to the ADA network, which holds regular symposia and webinars on the latest data science. If you are under 30 years old, join &more, the young researcher network that benefits from cutting-edge events, peer support and plenty of freebies. Supporting our work on inclusion? Check out MRSpride which runs events exploring LGBTQ+ representation in the sector.

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

Conferences

Data Analytics: Tools and Methodologies

Hear case studies demonstrating the application of advanced analytics for improved modelling and segmentations, customer journey mapping and automated benchmark analysis, as well as chatbot-based insight generation.

14 October

Sustainability Summit

Join the debate on how insight can influence outputs that help engage business and consumers with climate action. This summit showcases processes, products and approaches that can improve environmental footprints and deliver behavioural change.

11 November

Online Courses

Creating a Culture of Insightment

Find new ways of exploring, defining and capturing the famously elusive 'wild insight' that goes beyond traditional 'insight from data' approaches.

8 October

Project Management Masterclass

With projects often the cornerstone of a researcher's work, learn the fundamental skills and processes of effective project management.

13 October

Review and Refresh Your Surveys

Gain practical guidance on how to

Professional webinars and speaker evenings are free for members.

For information on all MRS events go to

www.mrs.org.uk/events



Virtual: all courses and conferences are live and interactive

conduct a robust review of your quantitative surveys, with options for refreshing them to better address today's challenges.

14 October

Online Qualitative Techniques

Understand the range of online techniques that are now part of the qualitative researcher's toolkit, including communities and ethnographic research.

19 October

Effective Depth Interviewing

Learn the theory and practices of online, telephone and face-to-face depth interviewing, in this lively interactive course.

20 October

Influence and Impact

Evaluate your personal impact and increase your influence in business through emotional intelligence and developing rapport through non-verbal communication.

21 October

Introduction to Moderating

Maximise your potential as a moderator by managing your nerves, using stimulus material and projective techniques, and

dealing with difficult respondents.

22 October

One Day MBA

Journey to the heart of successful business administration with the key management tools that deliver value and optimum commercial outcomes.

1 November

Infographics and Insight Visualisation

Understand visual storytelling to navigate through our information-loaded era and learn to create tailor-made, high-impact data infographics.

3 November

Online Panels and Communities

Discover how best to build, develop and maintain online panels or communities using web 2.0 for research, as well as options for software and resourcing.

4 November

Moderating Masterclass

Boost your moderating skills with practical tips, individual feedback and group coaching, to gain understanding about what goes on beneath the talking.

5+8 November



Charlene Li is founder and senior fellow at Altimeter, researching digital transformation, leadership and the future of work. She is the author of six books, including *Open Leadership*, *Groundswell* and *The Disruption Mindset*. Li previously worked as a principal analyst at Forrester Research, covering interactive advertising, search marketing, and the rise of social media

1 The past 18 months have been disruptive for businesses – how can organisations shift their mindset to focus on the next phase of growth?

When disruptions such as Covid-19 happen, needs don't go away – they shift. Growth comes from meeting these changing needs and now is a great time to look for them, because disruptions create opportunities for growth. But you need to move quickly.

2 How can businesses prepare for the future at times of uncertainty?

By getting better at making decisions without all of the information and being comfortable with the outcome, regardless of whether it's in your favour or not. Confidence comes from knowing that, either way, you'll be OK. In the end, that's the best way to prepare – by building up your confidence that, even in times of great uncertainty, you will be OK.

3 What does good leadership look like in 2021?

Leadership is a relationship between people who want to create change and those inspired to follow them. In 2021, leaders take to heart the importance of leaning into creating and deepening relationships, so they reduce the power distance between them and the front lines of the organisation. They also foster a sense of agency among employees so that they think and act like owners – and

yet crafting a new normal is going to take time, patience, and a lot of discussion that management is not used to having.

they communicate a clear vision of the future they want to manifest.

4 Are senior management teams paying enough attention to research?

I'd like to phrase that another way: are they paying enough attention to the future? Because that's what research does – it gives you a glimpse of what could be, however imperfect it is. Good research looks to the future and what is possible, rather than looking back in time to what's already happened. Senior management need to look far into the future so they can set the company's high-level strategy for how they will get there. All too often, that future is driven by gut feelings and hunches, rather than research. So now, not nearly enough attention is being paid to research because senior management isn't actively thinking or working on the future as much as it should be.

5 What will be the greatest management challenge in post-pandemic workplaces?

Re-establishing agreements, norms, routines, and rituals that take into account a new relationship between employers and employees. We have been to the brink and experienced a level of intimacy that we never expected. We are often virtually in each other's houses and bedrooms if we are remote workers. There's no going back to the normal, and

6 How can research business leaders attract more new recruits to the industry?

By grounding the research we do to real-world problems. I sometimes see research about a new technology or innovation, and while it's interesting, it's a data dump with very little insight into what it means. What does the research mean for customers, employers, brands and the environment? Make the questions we answer with research robust, holistic and relevant to the world and we will have people banging down the doors to work in the industry.

7 Do businesses need to rethink their relationships with consumers?

Yes, constantly. Consumers keep changing at astounding speeds – for example, TikTok didn't exist when the seniors that graduated this spring started high school. By far the biggest mistake that companies make is assuming that their customers today will be their customers tomorrow. You can't assume that's the case. Instead, be constantly examining the fringes of your customers to look for indications of emerging future customers, because that's where your future potential growth could be. But you won't know unless you look.

MRS Net Zero Pledge

A manifesto for sustainability

The research sector is taking steps to be part of the solution to the growing climate emergency. The first sustainability step for research organisations is the MRS Net Zero Pledge.

The Net Zero
Pledge commits to:



Delivering
net zero by 2026



Publishing
carbon emissions



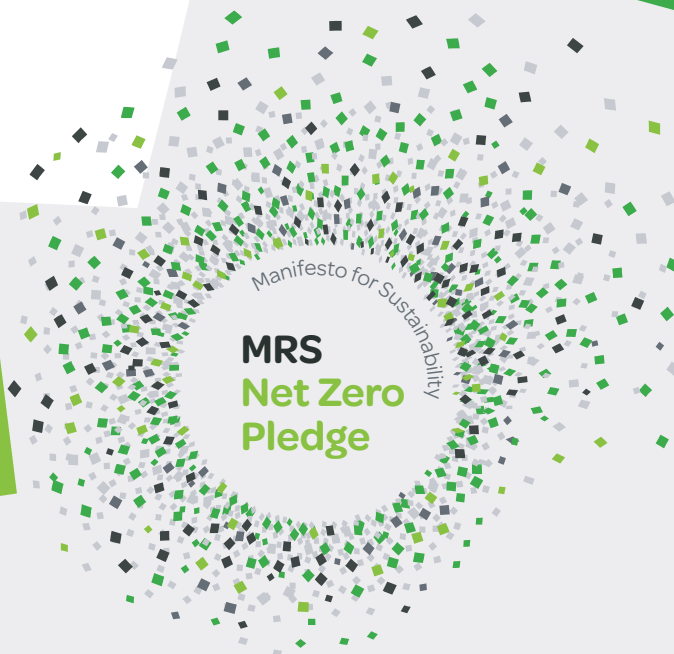
Collaborating
across the sector



Encouraging
the conversation



20+
organisations
have signed up



To find out more contact mrs.ceo@mrs.org.uk



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