impact

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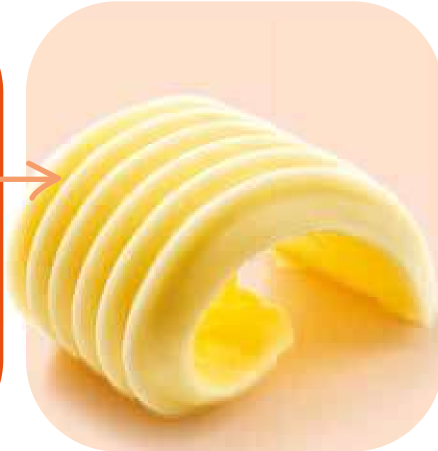
10th anniversary issue

Using evidence & insight to make a difference

Putting you in the picture

Going beyond the label of 'consumer' to understand the whole person

MRS

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Evolving context

Certain moments call for reflection, and in this issue of *Impact*, as we celebrate 10 years of the magazine, a look at the decade that has gone seems justified.

Launched in 2013, *Impact*'s original guiding philosophy was to look through the lens of the marketer and consider how evidence and insight can make a difference to their work. In the leader of the first issue, then-editor Brian Tarran wrote: "We've had years of discussion about how research is having to change – how it's becoming more commercially driven, more strategic in its recommendations. How 'nice to know' isn't an option any more. The 'need to know' is all that matters."

Later, when Jane Bainbridge took up the editor's role in 2014, she observed how world events meant the general population often viewed data collection and tracking as "dark and Orwellian practices", noting: "It will fall to our industry to demonstrate that it's not always about the loss of something like privacy, but also about the gaining of relevance and saliency."

Today, the 'need to know' of the insight function is still paramount, as pandemic pressures, budget constraints and wider economic and business challenges have made all the more evident. Years after Bainbridge's words, it is still incumbent on the industry to step up and prove the value in data collection, always remembering that people are at its centre.

I believe the original philosophy of the publication has evolved as, over the years, insight has gone beyond the remit of the marketer. During the pandemic, we saw how important insight teams became in managing how businesses responded to the crisis, from understanding consumer fears about crowded places to using foresight to inform scenario planning. As part of our anniversary feature exploring some of the trends that have shaped a decade in research (page 16), for example, we observe the growth in research in-housing, with multiple decision-makers involved.

We've also dedicated space to thinking about the future, as feels appropriate for our first issue of the year. On page 20, we have asked young researchers to share their thoughts – their hopes and dreams, if you will, for the industry over the next 10 years.

When I became editor in April 2020, the country was in the first few weeks of Covid-19 restrictions. In the time since, we have seen: two further lockdowns; no fewer than three sitting UK Prime Ministers; Russia's invasion of Ukraine; an energy crisis; and strikes for better workers' rights in several sectors. Oh, and the start of a new economic recession. It's no wonder that 'permacrisis' was recently added to the dictionary.

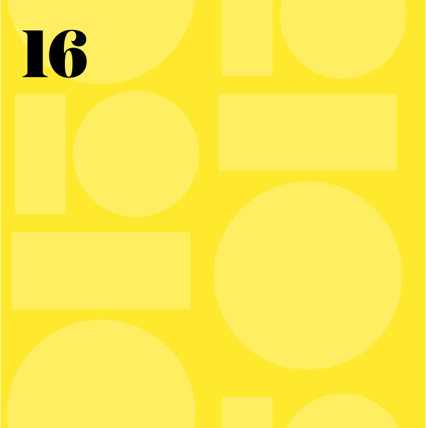
Businesses are increasingly taking into account this wider context, and its influence on people, in their approach to insight. In this issue's report (page 22), the Co-op's Sarah De Caux outlines how important this is to the organisation, particularly during a cost-of-living crisis, noting that it is the job of insight to "bring real people into the business". It is the role of researchers, she says, to challenge how stakeholders think and help them to understand people "beyond simply seeing them as a sales prospect, a number on a spreadsheet or in a chart".

In keeping that purpose in mind, those working in insight can set themselves apart. If the past 10 years have taught us anything, it is that it's healthy to expect the unexpected – but insight can and should lead from the front as we start a new year.

Contents

Issue 40
January 2023

22



16

Columnists

Don't neglect the old

I got it wrong. But then Daniel Kahneman got it wrong too, so I'm in good company. Both of us, on first seeing an Amazon Kindle, felt like some watcher of the skies when a new planet swims into his ken, or like stout Cortez... well, to put it more prosaically, we thought it would replace printed books completely.

This has not happened, and indeed shows no signs of ever happening. Why? Perhaps more importantly, what might the biases have been that lay behind our over-optimism?

I suspect one of them is plain old neophilia. We like new, shiny things – or we simply pay more attention to them and, consequently, rate them more important than they really are. But then something else happens; a trick of the mind. We start to pay far more attention to the specific ways in which the new is better than the old, to a point where we drown out any thought of how the old might have certain advantages that the new does not possess.

Standard features	L (£25,000)	GL (£35,000)	GLX (£48,000)
Cloth seats	●		
Electric windows	●	●	●
Leather seats		●	●
Matrix headlights		●	●
Heated steering wheel		●	●
Head beam assist		●	●
Panoramic roof			●
Cruise control			●
Adaptive cruise control			●
Active suspension			●

The imaginary table above is an old marketing trick that exploits this very same asymmetry of attention. Had the designer of this table so wished, he or she could have listed hundreds more features all shared by the L, the GL and the GLX: automatic transmission; rear wiper; heated rear window; tinted windows (I am showing my age here); Apple CarPlay (that's better); metallic paint. But they omit these quite deliberately, because the intention of the table is to get you to zone in on the extra doohickeys you get from spending an extra £23,000 on the GLX. It exploits what Kahneman calls WYSIATI – or 'what you see is all there is'.

By contrast, if the list ran to hundreds of items, with only four unique to the GLX, you might think: 'I can get 90% of the stuff I want for practically half the price. Why would I pay another 23 grand for a few trivial gizmos?'

In the case of shiny new technology, we don't need a table designer to misdirect our attention. We do it unconsciously. So, looking at a Kindle and comparing it with the plain old book, we noticed and enthusiastically ticked various distinguishing features straightaway:

- Instant gratification – you can buy a book in seconds
- Portability – you can take your whole library in your suitcase
- Enlargeable type (showing my age again)
- Searchable text
- And so on...

Misled by our excitement, we neglected to notice a few rather pertinent facts. For one, neither of us has mainstream reading habits – we both read a lot of purely textual non-fiction, for which the Kindle is perfect. We also failed to spot that a huge proportion of books are bought as presents. The Kindle is rubbish for gifting. We overlooked the fact that the Kindle is also rubbish at displaying photographs – so that's the cookery, food, sport, travel, architecture, art and gardening categories kiboshed too. We also neglected to consider that people rather like to display physical books on their shelves. (Perhaps one consequence of winning the Nobel Prize in economics is that you don't spend much time worrying about whether you look sufficiently intellectual to visiting dinner guests.)

I suspect, in time, we may come to realise that something of this same asymmetry has also distorted our appreciation of the different characteristics of new and traditional media. Quite simply, we have become so fixated on the things that the new media offers over the old that these small differences have come to dominate our attention, to a point where we think they are all that matters.

Certain characteristics of the new digital media are indeed new and significant (instantaneousness, accountability, pinpoint targeting, and so on). Yet these newly available attributes are a very long way from ticking every box against a complete listing of all the things that a medium can usefully do: costly signalling, social imprinting, reach, creative engagement, etc. We are so fixated on the adaptive cruise control that we have failed to ask questions about the engine.

I spent decades working in direct marketing. We tried to get people excited by accountability, measurement, and so on back then. But direct marketing, unlike digital marketing, wasn't shiny and new, so people preferred to make TV commercials instead.

It's WYSIATI every bloody time.

World view

News, analysis and insights from around the globe, edited by Liam Kay

"From the **very beginning**, it was about **'pride in our future'**"

(p12)

Asia-Pacific accounts for nearly 53% of global social media users

(p14)

"There is a sense of permacrisis, and the news communicates that"

(p10)

"The new refrain is **made by China** and **China chic**, showcasing local aesthetics"

(p14)

"**40%** of Muslim women in Indonesia and Malaysia want a **bigger voice in government**"

(p13)

"There has been a flattening and fragmentation of how young people consume news"

(p10)

Need to know

Increased scepticism and awareness of self care are shaping how young people think about news in three different countries, qual commissioned by the Reuters Institute has found. By Katie McQuater

In 1981, French sociologist Jean Baudrillard wrote: "We live in a world where there is more and more information, and less and less meaning."

The information economy has exploded since the advent of social media. No longer are audiences solely reliant on traditional news sources such as newspapers and TV – the media landscape has become fragmented, with multiple potential sources of information, from TikTok to podcasts.

Whether this influx of information has resulted in less meaning is up for debate, and worthy of its own analysis. What is clear, however, is that within this busy media environment – once you factor in the rise of misinformation, growing awareness of wellbeing and a recognition of the need for finely tuned critical thinking – you have patterns of news consumption that look quite different from how they did a few years ago, particularly for younger people.

For the past decade, the Reuters Institute for the Study of Journalism at the University of Oxford has run an annual quantitative study to track how people consume news in 46 markets across six continents. Among younger news audiences (aged 18-30), the survey has, in recent years, found greater reliance on social media, with young people identifying less with – and feeling less loyal to – news brands compared with older age groups.

"Broadly driven by the internet, there has been a flattening and fragmentation of the brand landscape of how young people consume news," says Konrad Collao, founder at Craft, which worked with the Reuters Institute to conduct qualitative research into young people's attitudes to news in the UK, the US and Brazil.

"37% of both 18-24s and 25-34s across all markets said they trust most news 'most of the time', compared with 47% of those 55 and older"

Source: Reuters Digital News report 2022

Craft's report found that young people didn't necessarily place more trust or value in mainstream brands, valuing different tonal approaches to news depending on the subject. For example, while TikTok has grown in popularity, young people still value mainstream brands for communicating serious issues. Collao notes: "What young people value are different tones – when the Queen dies, you want Huw Edwards telling you that, you don't want a TikToker."

That's not to say TikTok and its ilk can't be relied upon – the research found that young people are getting credible news from alternative sources – but rather that socially native news brands tend to allow for more conversational approaches.

Researchers also noticed a distinction between 'the news', a narrow understanding of politics and public affairs, and 'news' – simply something that has happened.

For Kirsten Eddy, postdoctoral research fellow in digital news at the Reuters Institute, this was clearly illustrated through the qual, with participants discussing a wide range of topics considered to be news – from an episode of Big Brother to a gaming release.

"Younger audiences have a much different understanding of what news entails – there is an incredibly broad understanding of what news is and that really influences what they consume, and when and why they consume it, in ways that have serious implications for many news brands around the world," says Eddy.

Sense of 'permacrisis'

The institute's most recent quantitative survey found longer-term falls in interest in news across age groups and markets – particularly younger audiences, who increasingly choose to avoid news. Around four in 10 under-35s 'often' or 'sometimes' avoid the news, compared with a third of those aged 35 and older.

Across the three countries studied for the research, there was evidence of people opting to avoid 'the news' – often to guard mental wellbeing.

Collao explains: "It is not that one group is

"In 2022, 39% of people aged 18–24 said social media was their main source of news, overtaking news websites and apps"

Source: Reuters Digital News report 2022

rejecting news totally, but that 'the news' is under pressure from three directions – a flatter landscape, suspicious minds not automatically trusting mainstream brands, and selective news avoidance. In our sample, someone always pulled away at some point because it was all too much."

Some of this is down to where news is consumed. Seeing an article on social media alongside content from friends and family means news appears in an endless narrative scroll, resulting in fatigue and becoming choosier about engaging.

"Brexit, Covid or the culture wars – these are stories without end. You could see people getting fatigued, so they dip in and out to guard their mental health," explains Collao. "There is a sense of permacrisis – and the news communicates that."

On 24 February 2022, Russia invaded Ukraine, leading to the biggest conflict in Europe since World War II. Such a significant event during the fieldwork meant that those taking part turned to mainstream news brands because, notes Collao, they are trusted and accessible.

"In one diary, we asked people what they were following, and it became all about Ukraine. When something of that magnitude hit, they coalesced around the story and the big mainstream brands."

Participants also looked to user-generated media for the human story on the ground in Ukraine, with TikTok, Instagram and Twitter being used to share perspectives not just by journalists, but by citizens themselves, including Ukrainian president Volodymyr Zelenskyy.

Increased scepticism

Despite differences in the markets studied – different types of political polarisation being one – one commonality emerged: young people showed high levels of scepticism towards news, questioning its veracity and the motivations of its sources.

For Eddy, the extent of this was surprising. "For those who practise and study journalism, we've spent a lot of time focusing on media literacy, ensuring that people are aware of what information they are consuming and have a sense of wariness toward dangerous or false information. In many ways, great practices.

"But younger people who have been told to be critical of information they consume are increasingly sceptical of all information – including from news organisations – and largely question their agendas across the markets we looked at."

Brazil in focus

In Brazil, the critical role of language emerged from the qualitative research as an important factor in how news is consumed among young people.

With fewer alternative media sources in Brazilian Portuguese, mainstream news brands held greater importance for young people in Brazil than in the US, which has a much more fragmented media ecosystem.

"We didn't see the same kind of rise of alternative media in young people's diets in Brazil, despite a lot of the conversation that we have in public discourse about the rise of alternative media and people turning away from the mainstream news brands," says Eddy.

The research also found that WhatsApp was much more important for news sharing to young Brazilians than young people in the UK and the US. Participants in Brazil cited the app as a useful way of keeping up with bigger news stories, but more 'serious' news consumers questioned the veracity of what is being shared via the platform.

Rebuilding pride

Research to help Manchester Pride's annual event be more in tune with the expectations of the city's LGBTQ+ community has highlighted the importance of co-creation. By Liam Kay

From the parade to protest, through a vigil and a party in the iconic Village area, Manchester Pride has long sought to be a representation and celebration of the city's LGBTQ+ community. The charity behind the event also works year-round to support and fund local charitable causes aimed at this group.

However, recent Manchester Pride events have drawn ire, with accusations that the charity is not delivering an event that caters enough to the needs of local LGBTQ+ people. A music festival, Manchester Pride Live, often attracted big-name stars, but was criticised for the fees spent on artists and high ticket prices. This reached a nadir in 2019 when it was headlined by Ariana Grande.

While the festival drew large crowds, many attendees were not from the LGBTQ+ community. Festival satisfaction ratings, conducted by Mustard Research, were much higher among heterosexual people than other groups – 53% compared with 42% among gay men, for example. Satisfaction was lowest among older age groups (45+), queer, pansexual and trans/non-binary people.

"Because it was such a controversial issue, the charity felt it needed someone independent to manage the whole process," says Anthony Shephard-Williams, director at Mustard Research, which examined views of the Pride festival and its wider impact. "We wanted to unpick the festival format, but also the charity. From the very beginning, it was about 'pride in our future'."

Research by Mustard, carried out in November 2021, including listening groups, in-depth stakeholder interviews and an online survey, highlighted a "disconnect" between the festival and what the charity does, according to Shephard-Williams. "A lot of people thought Manchester Pride was just one weekend in the year and didn't see the other work the charity was doing," he says.

An interactive consultation held to gauge views from the LGBTQ+ community about Pride's performance proved to be fractious, with the charity even taking the unusual step of employing security. The day underlined considerable divisions in the local community, says Shephard-Williams.

The team came away with an understanding that the community felt Manchester Pride weekend had become increasingly exclusive and commercialised. More advocacy for LGBTQ+ issues and putting the community back at the heart of Pride was seen as crucial. The most important elements of Pride, according to survey participants, were deemed to be the parade (86%), the candlelit vigil (77%) and the party in Manchester's Village area (74%). Only 38% backed the continuation of the music festival.

Following the research, the charity refocused on three areas for its 2022 Pride: education, campaigning and community. It also cancelled the music festival given the negative feedback uncovered during the research.

Manchester Pride will also use its platform to promote LGBTQ+ community and grassroots events throughout Greater Manchester all year, and to create more opportunities for community-led and curated events and activities at Pride.

Shephard-Williams says: "Manchester Pride really listened to us, and not just in cancelling Pride Live. There's been so many changes made to the charity – they have a new grant-funding process that is very transparent. People can see the breakdown of the ticket price and where it is going."

Chloe Stephenson, senior research executive at Mustard Research, concludes that the process of engaging with the community and acting on its feedback had a very positive effect, with participants pleasantly surprised the charity took feedback on board to the extent that it did.

The charity has created workshops, surveys and consultations to help it consult with its communities on the co-design of future Pride events, and has set up processes to work with local businesses and organisations.

"We learned so much from speaking to each other about our own experiences, and then speaking to the community and to Manchester Pride," Stephenson says. "That has led to this community co-creation and co-design – it has shown me the importance of doing that in research."

Making voices heard

Shifting gender dynamics are leading to profound changes in the outlook of young Muslim women in southeast Asia.

By Chen May Yee

In marketing and advertising, Muslim women tend to be depicted as homemakers or as carefree young hijabis chasing the latest (modest) fashion and (halal) beauty trends.

It's high time for more realistic portrayals of Muslim women: as mothers and wives, yes, but also as students, workers, entrepreneurs, politicians and activists.

Muslim women are making headlines. In Iran, young women protested in schools and in universities after the death in custody of 22-year-old Mahsa Amini, detained by the morality police for not satisfactorily covering her hair. The protesters' chants could not be more evocative: "Woman, life, freedom".

In Afghanistan, women and girls took to the streets after a suicide attack on ethnic Hazara students sitting for a practice university entrance exam in Kabul.

If it seems like a moment, it is. They're saying they have had enough of discrimination and inequality imposed by men in the name of religion. They want their basic rights – to education, to matters of marriage and divorce, to participate in public life and to cover or uncover their hair. They're risking life and limb to do it.

In southeast Asia, Muslim women have far greater freedoms than women in the Middle East. Indonesia has had a female president; Malaysia has a woman chief justice and women play a large role in public life, from academia to business to entertainment.

Yet there remain challenges. In Malaysia, women have made up more than 60% of university students since the 2000s. Yet women comprised just 13.5% of candidates in national elections in November 2022. Clearly, there's a gap between ability and achievement, between expectation and opportunity.

Our report, *The New Muslim Consumer*, in collaboration with Wunderman Thompson Jakarta and VMLY&R Muslim Intel Lab Kuala Lumpur, explored how men and women feel about changing gender roles.

In May 2022, we surveyed 1,000 Muslim respondents across Indonesia and Malaysia (see boxout). We found that 42% of women say they provide the most financial support in their household, yet most brand communications for financial products and services continue to focus on men.

In recent years, debates over a woman's place in Islam have spilled out from the rarefied confines of Islamic universities and scholarly organisations into the public sphere, thanks to social media.

As gender relations shift, businesses and brands have an opportunity to champion women – and young women in particular.

It could be as simple as switching things up – for example, targeting women for financial products and men for kitchen cleaners, or depicting more women making decisions in the boardroom.

Businesses could also voice their support for young women who are protesting injustice, the same way they might pledge to fight climate change or racial discrimination – even if it risks hurting their bottom line.

● ***Chen May Yee is Asia-Pacific director at Wunderman Thompson Intelligence***

2022 survey research with Muslim participants in Indonesia and Malaysia found that:

- **89%** of women say they typically handle housework, 83% handle grocery shopping and 54% handle childcare
- But **72%** of women feel that childcare should be shared equally between husband and wife, while 73% of women feel housework should be equally shared
- **51%** of female respondents strongly agree that young women should have an equal voice in marriage/relationships (versus 37% of men)
- **40%** of female respondents strongly feel young women should have a louder voice in government (versus 26% of men).

Love local

Across Asia, tensions between traditional and global cultures are giving rise to a desire to embed history within newer cultural expressions, according to qualitative research from Crowd DNA

Culture hits hard everywhere, but the impact and pace of change across Asia is particularly compelling. Ideas, concepts and innovations are spreading with greater alacrity than elsewhere. Once there was concern about 'Americanisation' in the region – that notion now sounds quaint.

The east profoundly influences the west in what is becoming an established trajectory. Brands are facing up to the reality that everything from fitness goals to drinking occasions, and from the meaning of wealth to how purpose is defined, plays out differently. Western brands have long struggled to understand the influence of tradition across Asian cultures. Throw in the intensification of emergent 'fast culture' factors and the challenge is significant.

While there is much to be excited about for younger generations across Asia, it does generate some cultural tension. We explored a cognitive dissonance: the desire to be citizens of the world, globally plugged in, versus the innate sense of place, connection and pride in localism.

Expressions of 'fast culture' (think food and fashion) are drawing from their 'slow culture' roots (think history and tradition). Driving this is a fear of a rising global monoculture: from fusion foods bearing no resemblance to their inspiration to global home aesthetics getting more identikit.

Younger audiences are pushing back from monoculture; we're seeing hybridising of old and new, local and foreign. From this comes a fresh way to reflect identity, paving the way for something more personally defined, challenging stereotypes and Western hegemony.

Unsurprisingly, in many ways it started in South Korea, with the explosion of the 'Korean Wave' (also known as *hallyu*), their philosophy of '*ppalli ppalli*' – meaning 'fast fast' – bringing a sense of immediacy to new ideas and how they're communicated. But it doesn't stop with South Korea.

We combined trends analysis and collaboration with members of Kin, Crowd DNA's network of creators and connectors

across Asia, to explore how the local love theme is playing out more broadly. They articulated what emerged from this exploration as three shifts.

Shift #1: The rise of remix culture

In a globalised world, Asian brands are increasingly blending tradition and modernity to reimagine local identity, while still honouring it and appealing to the global mass market.

Chinese brands best epitomise this by redefining their local image on the global stage. If 'made in China' has negative connotations, the new refrain is 'made by China' and 'China chic', showcasing local aesthetics as a competitive advantage and Chinese youth's pride at what is distinguishable from global norms.

Chinese streetwear is a great example of this. Sankuanz, for example, has been credited by local magazine mRaadii as

diverse team from across the globe who have come to call Singapore home.

Shift #3: Cultural co-creation

No longer the passive audiences they might once have been stereotypically assumed to be, young Asians are becoming active creators and curators. This is about shifting the right to authorship and democratising access to production via digital platforms. Asian youth are using this to their advantage, empowered in a borderless space where they can easily connect with each other, form communities and inspire.

The rise of young Asian influencers is notable. With Asia-Pacific accounting for nearly 53% of global social media users, their power is significant and the push for credibility intense. Tokyo's YouTube and TikTok content producer Cyber Bunny produces uplifting segments to teach adults and kids about Japanese language; music content creator Alffy Rev combines folk and patriotic songs with digital tech.

Meanwhile, at this year's New York Fashion Week, the Asia Fashion Collective incubation project spotlighted emerging designers of Asian descent– WooLeeX, Sung Ju, DOKKA vivid, Glenda Garcia, Yuuna Ichikawa, and Cocotono.

Where do brands come in? They'd better come in carefully and empathetically, or probably best not to come in at all. There is an opportunity to celebrate the blending of tradition and modernity and create new ways for local audiences to explore and experiment.

It's about advocacy over appropriation, championing local voices and communities, not mimicking their culture. While this may sound obvious, brands still struggle to do it. Ultimately, it's about reversing the flow – challenging the traditional one-way exchange of the same stories being told by the same people.

By Andy Crysell, El Pigram, Ariel Malik, Caranissa Djatmiko and Myrahans Lafrelle at Crowd DNA.

"It's about advocacy over appropriation, championing local voices and communities, not mimicking their culture"

combining "high-fashion credentials that still feel in touch with the ever evolving Chinese underground".

The reverse is happening on the global stage, too, with Marvel's cinematic universe departing from its anglicised roots to integrate themes, narratives and identities from across Asia (hello Shang Chi, the first Asian superhero from Marvel, and Pakistani Muslim teen superheroine Ms Marvel).

Shift #2: Severing stereotypes

Cultural narratives are moving beyond symbolic tropes and stereotypes, making them less rigid and purist. Culture is not binary; it isn't about choosing between fully conforming to the status quo or breaking it. Increasingly, Asian youth are creating narratives that are more fluid, experimental, and that truly reflect their journey of invention.

Take Singapore. Much of its approach to diversity is loaded with principles of pragmatism and ethnic difference; its multiculturalism the result of carefully crafted communication around equal representation. But there is now a reassessment of cultural identity, pushing against manufactured narratives, with grassroots communities practising intersectional experimentation, rather than conforming to a given definition of 'authenticity'.

Commercially, Singaporean menswear brand Duxton does this nicely; its varied approach to design is attributed to its

The decade in 10

To celebrate 10 years of *Impact*, we explore 10 trends that have shaped the decade for insight, and hear from industry figures on what these shifts have meant for research.

By Katie McQuater **and** Liam Kay

Covid-19

The pandemic changed the way we worked, lived and shopped. Some changes were temporary, some were longer-lasting, but what it did was emphasise the importance of staying connected to customers and gauging the mood of the public, reinforcing the role of insight.

"Covid-19 has had such a long-lasting effect on our planet," says Neil Mortensen, director of audiences at ITV. "Millions of individual and communal stories delivered every emotion, from hope to despair. In our small corner of the world, ITV spoke to our audiences every day. We listened and gave them an open book to talk about their lives, worries and their TV viewing. We fed this back through lockdown with weekly webinars to the whole plc. Something amazing happened: our inboxes were flooded with colleagues expressing thanks for our audience insights and, more importantly, comradeship. We were holding up a mirror to ourselves, connecting to the world and realising we weren't alone."

Jane Ostler, executive vice-president, global thought leadership at Kantar, says: "Some things have returned to 'normal' – for example, there has been a return to real-life marketing. The one thing that has shifted dramatically is that, with such rapid macroeconomic change, understanding consumers and interpreting insights for agile decision-making has never been more important; insight needs to provide clear guidance and predict outcomes in a fast-changing world."

Macroeconomic and geopolitical pressures

From the election of Donald Trump to the UK's vote to leave the European Union, the past 10 years have highlighted the role of wider macro and geopolitical trends on businesses.

"The research industry – and in particular, opinion polling – has been at the heart of understanding how people have reacted to the post-2008 environment of low growth, and the surge of populism across America, Europe and Latin America," says Ben Page, chief executive at Ipsos. "Fiercely contested, narrow wins, based on new electoral coalitions, have challenged the accuracy of polling of all kinds. Overall, however, the research industry has kept up. In the last election in the UK, for example, despite the 2016 upset, the polls averaged only 0.6% error for each party."

Sabine Stork, senior partner at Thinktank, says: "It's self-evident that politics matter and have an impact on attitudes and behaviours. Just compare the differences in interest in electric vehicles across different US states, or views on climate change across the Atlantic versus here in Europe. Or how cost-of-living and energy crises will be mitigated, or otherwise, by political interventions.

"Yet qual debriefs have a tendency to cover only the fluffier end of context – that is, psychology and culture – and marketers can display a surprising lack of knowledge about what's going on politically in their portfolio countries. This means there's an opportunity for international researchers to fill the gap here and unearth more about how legislation, politics and economics interact with what products and brands people have access to and are interested in. Given that public life around the world is likely to remain volatile, you could argue that this kind of analysis will even prove to be indispensable."

Disintermediation

A shift towards in-house research, driven by budget pressures and facilitated by the rise in self-service technologies and quick tools offering rapid turnaround surveys, means the insights market looks different from how it did in 2013.

"The biggest change that has already happened, and is continuing to happen, is the growth of the in-housing of insights via do-it-yourself platforms," says Ray Poynter, chief research officer at Platform One, and managing director at The Future Place. "Research I conducted in 2020 and 2021 suggests that more than 50% of research projects are now conducted internally by clients. The number of platforms is exploding; they are getting better at what they do and they are getting easier to use. The growth in the use of these platforms is not principally among client-side insight professions; it is among decision-makers – for example, engineers, designers, brand managers, chief marketing officers and chief operating officers. This trend is going to reshape our industry."

This reshaping of the sector is positive, according to Ipsos's Page. "Whole areas of what the research industry used to do have been disintermediated by the web. Entire types of study we used to do are now routinely handled by clients themselves with software-as-a-service (SaaS) tools, or with software goliaths," he says. "That is good – it has forced the industry to focus on delivering more value than simple data. The industry has also built its own SaaS solutions, and automated for itself and its clients – all of this is great in terms of freeing researchers to think about implications and recommendations rather than 'getting stuff done'."

Climate crisis

This has been the decade of Greta Thunberg's school strikes and Extinction Rebellion, but it has also been the decade of climate denial endorsed by right-wing leaders, forest fires, and the hottest summers on record. Renewed urgency and heightened awareness of climate change mean the evidence can no longer be ignored. Jane Frost, chief executive of MRS, says: "The climate crisis should be the world's number one concern and it's encouraging to see the promising steps our sector has made in the past decade in practices and attitudes. In particular, we've been pleased to see a large number of companies sign the MRS Net Zero Pledge and make the commitment to reach net-zero emissions by 2026. However, there is still much more to do. Market research has a crucial part to play in encouraging businesses and governments to be more sustainable. To do this, we need to ensure we're asking the right questions, identifying the problems, and providing businesses with actions to solve them.

"We all have a responsibility to have open, direct conversations within our wider organisations and with clients, to continue improving practices across our sector and those we work with."

Flexibility in place and method of working

In 2013, Zoom was something your car did on the motorway. With enforced remote working acting as a catalyst in 2020, businesses and people have realised the benefits of operating more flexibly and that is also reflected in the way research is conducted, with in-person focus groups being adapted for online, for example.

Sinead Jefferies, senior vice-president of customer transformation at Zappi, says: "Businesses that properly think through the people, processes and systems they use to maximise the power of in-person moments for deep human connection, solve hard problems, and equip people to work asynchronously are clearly going to have a strong advantage."

The same must be true for how practitioners approach research, notes Jefferies. "There have always been innovators in this sector looking at finding new ways to have meaningful exchanges with research participants. This is about much more than moving an in-person focus group to an online focus group, but allowing us to achieve different goals and understand our attention-short, app-devouring audiences through both new and familiar tactics. We also need to ensure that, as we embrace these new tools, we are paying proper attention to making sure this increasingly 'remote' data is properly representative of the audiences we're trying to understand."

She adds: "Perhaps we have too often been afraid to move away from the approaches we know and trust. Now is a time to be brave – but to be brave with clear purpose."

Immersion in a physical location is still important for some projects, however, notes Thinktank's Stork. "There are obvious lifestyle upsides to not spending half a week travelling to and from Heathrow, and to eating a proper meal at home after your Zoom group. Plus, decisions about method have become more deliberate than they were, say, 10 years ago.

"However, we're in danger of heading not for real flexibility of location, but merely for less direct interaction in research – and, in international research, for a less immediate understanding of place and context.

"No doubt today's younger researchers will still acquire a good skill set and will probably excel at digital interviewing, but they will miss out on a quick Mexico City supermarket visit to see their clients' brands displayed, and on walking around the streets of Shanghai to see how people dress. In effect, such marginal observations produce a certain 3D aspect to 'getting' the culture of the people interviewed, and may make the difference between a memorable research project and just another project."

Data privacy

With the Facebook-Cambridge Analytica scandal coming to light in 2018, an expanding regulatory sphere for data protection (namely, the introduction of the General Data Protection Regulation) and growing awareness of data privacy have created unprecedented challenges for researchers and businesses alike. Ipsos's Page says: "Ensuring consumer privacy and proper handling of personal data has resulted in a large rise in compliance teams, as GDPR and beyond becomes simple table stakes for running a business. Public awareness of privacy – and, simultaneously, public apathy about it – have risen with the digitisation of the economy in the past decade."

Misinformation and disinformation

Social media algorithms and the growth of networks have a huge impact on people's lives, offering new ways of understanding people and conducting research. But they have also become channels for misinformation, allowing conspiracy theories and fake news to spread, and negatively impacting people's lives and democracy as a whole.

Behavioural science

In the past decade, behavioural science has moved from academic pursuit to mainstream practice. For example, in the public policy sphere, it has been applied in the introduction of auto-enrolment workplace pensions. Within the industry, it has become part of the researcher's toolkit.

"Using behavioural science techniques and technologies to understand and interpret consumer attitudes and behaviour is vital – and, when applied to research solutions, they are hugely valuable for understanding and amplifying insights," says Kantar's Ostler. "Behavioural science layered with artificial intelligence applications will play an even greater role for insights in 2023."

Accountability

From the #MeToo movement in 2017 to the Black Lives Matter movement reaching critical mass in 2020, equality and inclusion became must-haves, not nice-to-haves. And with consumers increasingly savvy and questioning, it's become more vital for businesses to be accountable.

"As well as measuring attitudes on racism and misogyny, and how they are evolving, 2020 saw the research industry itself – as with all business – under scrutiny, often from its own people," says Ipsos's Page. "Industry associations and research businesses have had intense internal conversations – and done much more on setting targets to have more diverse senior leadership and recruitment, and to make research a more inclusive business. All the evidence on effective forecasting shows that more diverse teams make better forecasts, and to stay relevant and competitive research companies have to evolve."

Insights partners challenging the status quo

With ever more access to data, insights professionals are proving their role as more than just producers of data, and acting as strategic partners to client businesses – accelerated by the pandemic.

Zoë Ruffels, global head, vice-president of consumer and business insights and analytics at Mars Pet Care, says: "The need for strategic insight partnership is not very new. What is important in a world of abundant data is the need for insight provocateurs who can ask the tough business questions, challenge the status quo, and stimulate debate and ideas. This needs to be our role in the future, ensuring that we do not focus on the here and now, but on the what if, so what, and what's next; the increasing need to spark future-facing ideas with a depth of insight, inspiration, and conviction."

Frost, at MRS, says: "Research professionals have always had the capacity to be strategic partners, but it was a crisis that opened the door to the boardroom. At the outset of the pandemic, government and corporate leaders put us at the heart of organisations, leaning on our sector for guidance about their customers and the wider public.

"This reliance has continued since, and rightly so. An effective organisation requires an understanding of its target audience, something that cannot be done without insight. But we offer more than that, and a recent MRS Delphi report has presented our role as an 'insight alchemist', delivering evidenced outcomes that can systematically transform organisations."

Key stats of the decade

The UK voted to leave the European Union in June 2016 by 52% to 48%.

In 2016, Donald Trump was voted 45th president of the US after winning the Electoral College with 304 votes compared with 227 votes for Hillary Clinton.

More than five million people in more than 600 marches globally protested for women's rights in January 2017, on the first day of Donald Trump's presidency.

11.7m UK jobs were furloughed through the Coronavirus Job Retention Scheme in 2020-21, at a cost of £70bn.

2021 was the 45th consecutive year (since 1977) with global temperatures – at least nominally – above the 20th-century average.

Apple became the world's first trillion-dollar company in August 2018.

The #MeToo hashtag spread on social media in 2017, garnering more than 19 million tweets.

From breaking out of bubbles to focusing on action, 10 new voices share their hopes for the future of insight and their calls to action for the industry over the next decade

THE FUTU

LaShanda Seaman,
qualitative research manager, Opinium

The challenge for our sector will be to continue advancing to meet the expectations of the upcoming generation so that we remain a relevant and viable career path. Over the next decade, I implore the industry to invest in young researchers through traditional and non-traditional methods, allow them to have a seat at the table, and be open to the change they bring. Let's allow market research to become a sought-after career path because of the way we treat our people, the diversity of our organisations, and the impact of our work.

Carolina Starkhammar,
principal, Incite

I hope the market research industry will work towards becoming more accessible and use its increasing diversity more purposefully. In a profession centred on understanding different people, our industry is surprisingly homogeneous. A diverse workforce can help identify and address the real issues in our community.

My call to action is to recruit beyond traditional methods and invite people with unique backgrounds, experiences and ideas to the decision-making table. This isn't a box-ticking exercise – these are real people who can add real value to your business.

Joanne Oguntimehin,
project director, Humankind Research

My hope is that market research will continue to strive for diversity of people and thought, and really champion the value that exists in different backgrounds and lived experiences. I also hope it will be put on the map as an interesting career path that more people run towards.

My call to action over the next decade is to ensure that the necessary infrastructure is in place to accommodate the diversity it seeks – and, as always, for action to follow words.

"I hope market research will continue to strive for diversity"

Tarek Chaudhury,
independent qualitative researcher

It's imperative we demonstrate the value of research. We often take for granted that everyone in a business understands the value of research, and that's been a factor in the commonplace silo-ing of insight functions.

For agency-side and freelance colleagues, it's too risky to rely on a small number of relationships at a client business for your pipeline – there is a need to spread awareness of the value of insight across the whole organisation.

To echo a recent *Research Live* article by Rick Kelly, of Fuel Cycle, we need to remember that most departments are novices in market research. We need to show them the power of understanding their customers and audiences.

Matthew Hellon,
research manager, Basis Research

My hope is that market research can go beyond delivering insights and contribute in a more meaningful way to the development of products and services that have a real impact in the world. Research should be central throughout the design process, not just a starting point. Therefore, my call to action is for the market research industry to work more closely with designers, innovators and entrepreneurs, to ensure that people's needs are not just accurately collected and understood, but also acted upon.

"Research should be central throughout the design process, not just a starting point"

URE IN 10

Beatriz Molina Sánchez,
audience research officer, Nato

My hope for the future of market research is that researchers are trained to use tools that help them synthesise datasets and make sense of an increasingly crowded information environment. This will only be possible if agencies and client organisations invest in continual professional development and emerging technologies – more precisely, in tools for the collection and analysis of behavioural and attitudinal data.

The value of research is to inform organisational decision-making, and without fully exploring all available data, the insights will only be partial. It's essential for the industry to focus on the priorities of investing in training and technology.

Bessie Pike,
senior innovation and research designer, The Mix

My hopes for the future of market research would be that, instead of moving towards a more digitalised future, we go in the opposite direction towards something that is intimate, raw and unfiltered.

Too much of the world is already pre-curated for us, from algorithms dictating our interests to dating apps choosing our next partner.

The focus should be on breaking out of this false, digital bubble we've found ourselves in and, instead, step back into the real, flawed and imperfect world.

That's where the most true and powerful insights will come from, not from behind a laptop screen.

Adam Mills,
head of insight and loyalty, The Wine Society

For me, the action we need to take is simple: we need to challenge more, and we need to push the boundaries of decision-making. Market research is the most important department in any organisation – it's the gateway into the mind of the consumer.

Make sure that the consumer is at the heart of any decision made. At times, that's going to throw up some problems; how many times have we heard 'but is that really true?' in response to a piece of research?

Challenge your leaders to be more reflective of their audience, push research in new, interesting ways, and be inquisitive. It's our job to hold our businesses to account to our audiences.

Matt Walker,
customer and member research manager, analytics & insight, Co-op

A key area for the future of market research is to focus on impact and actionability.

It should be less about chasing deadlines, putting together fancy PowerPoint decks and aiming to simply keep the client happy, and more about clear identification of opportunities that will make a real impact on the client business – and communicating them in a way that garners the support of wider stakeholders who often have less knowledge of the nuts and bolts of research.

"It should be less about aiming to simply keep the client happy"

Elle Gallon,
research director, InSites Consulting

I hope that our industry takes the time to reflect on the world around us and how we interact with it. As researchers driven by a passion to understand humans, we have an opportunity to help brands make positive change by sharing insight.

Our understanding needs to be individual and collective, considering the wider socio-political-cultural conditions within which people make decisions. And, given the rapid pace at which our world changes, we need to be fast, flexible and future-focused in how we seek to gain insight.

By keeping people, the planet, and the forces of change central to our work, we can help brands to understand what matters most.

Bringing people together

Insight is being used to bring the whole picture of humanity – with all its multifaceted, real, messy perspectives – to businesses. Rob Gray **reports**

Data capture, data science, datapoints, data crunching, analytics. Data is at the heart of corporate life, of what we do at work. Often a sea of data. But what about, to use Professor Brené Brown's famous phrase, 'data with a soul'? What about the human dimension? Shouldn't people and their stories be at the heart of the matter?

The lines are blurring in life – there is less of a distinction between our roles as employees, friends, partners or parents. On top of that, individuals are not only consumers of brands and products, but also of culture, media, trends and natural resources. Meanwhile, business leaders cannot afford to operate in silos, or take a blinkered approach, given the many challenges they face, from market-disrupting competitors to shifting customer demands and wider geopolitical pressures.

Many organisations recognise the need to be consumer-centric, but it is another leap to actually become human-centred in their approach. It's hard to capture a much fuller picture that goes beyond the label of 'consumer' – and, in the main, the research industry is overly reliant on old ways of thinking. Vital insights are missed through a failure to get a 360-degree view of the person behind the data.

There is growing awareness of this problem, both within agencies and client-side. Yet there are obvious impediments to building a 'human-centric' approach when clients face an array of short-term pressures. In that light, humanisation is perhaps at risk of becoming a fad or just another buzzword. So, what is going on?

"It is interesting that, as categories dissolve a little bit, or at least soften, clients are becoming more conscious of being people-centric," says Paul Child, global client partner at InSites Consulting. "A live example of this intersectionality is electric vehicles. Who owns those? Is it automotive or utilities companies? Both have a stake in it because it's a new category. But if we think about it in pure category terms, we don't really get anywhere.

"In a highly fragmented society, we are all people. As Amazon's Jeff Bezos has said, when anecdotes and the data disagree, the anecdotes are usually right. If we think of qualitative research and human-centric research as anecdote and story building, that's your route to activating insight. It's the stories

people remember and why they make change."

Regulatory drivers

Child does a lot of work in financial services, a sector that, over the years, has attracted considerable criticism around customer service and fairness to consumers. However, regulatory change led by the Financial Conduct Authority (FCA), which committed in 2021 to becoming 'more assertive', has ramped up pressure on firms by setting higher and clearer standards of consumer protection across financial services, and requiring them to put their customers' needs first. These changes are known as the consumer duty. The FCA

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Real stories put focus on potential climate change health impact

The Wellcome Trust's remit is to fund science and health research that will impact the world and people. It believes it must listen to people from the ground up to determine where funding should go and how best to implement and communicate that work. Wellcome is currently prioritising climate change as a key area for research and development, and worked with Ipsos on the link between climate change and health.

Community-based ethnography took place in six countries (United Arab Emirates, Kenya, South Africa, South Korea, Brazil, Thailand), engaging local ethnographers, researchers, activists, and filmmakers to be the key ethnographic participants. Researchers first conducted an auto-ethnographic study reflecting on the themes of climate change and health. Co-analysis with them identified emerging themes and paths for further inquiries, leading to the construction of two more phases of fieldwork in which they reached out to their wider communities and networks. Continued analysis and outputs were constructed in partnership with the local ethnographers, culminating in a report and a documentary film. A few of the ethnographers attended the client's screening virtually, giving local community representatives the opportunity to speak for themselves..

"In several countries, people raised the issue of heat and increasing temperatures and fertility and foetal health," says Heidi Hasbrouck, director, ethnography at Ipsos. "There were a lot of stories around that, anecdotes from friends and so on. The scientists dismissed it because there was no scientific proof, then they caught themselves and asked: 'Or is it just that it hasn't been studied?'"

Wellcome subsequently put out an international call for scientific research to understand the links between heat and maternal and foetal health for up to £5m.

published finalised guidance on the consumer duty in July 2022 and its expectations make for interesting reading, including that firms should:

- Put consumers at the heart of their business and focus on delivering good outcomes for customers; provide products and services that are designed to meet customers' needs, that they know provide fair value, that help customers achieve their financial objectives, and that do not cause them harm
- Communicate and engage with customers so they can make effective, timely and properly informed decisions about financial products and services, and can take responsibility for their actions and decisions
- Not seek to exploit customers' behavioural biases, lack of knowledge or characteristics of vulnerability; consistently consider the needs of their customers, and how they behave, at every stage of the product/service life-cycle
- Continuously learn from their growing focus and awareness of real customer outcomes
- Ensure that the interests of their customers are central to their culture and purpose, and embedded throughout the organisation
- Monitor and regularly review the outcomes that their customers are experiencing in practice, and take action to address any risks to good customer outcomes.

The onus is on firms to gain a deeper understanding of people and ensure human insights, rather than just data, inform product development. Nationwide Building Society, an InSites Consulting client, is seeking to do just that. "As a member-led organisation, bringing our members' experiences to life and putting them at the centre of how we create our products and services is key," says Livvy Gill, research manager at the building society. "The stories from our research add to our data to provide a more colourful and engaging picture. While we continue to use primary and internal data to inform and evidence our decisions, the stories we tell about real people bring that data to life and inspire colleagues to take action."

Nationwide runs a number of regular pieces through its Member Connect community, combining a survey approach with deep dives, to help stakeholders feel closer to the experiences of its members, and ongoing diary studies to help build "understanding and empathy" over time, according to Gill.

Increasingly, the role for the research team, she notes, is to help activate insight within the society and to inspire stakeholders to become more "member-centric in their approach". She adds: "The focus on real people, real lives and real experiences helps us solve real problems for our members."

"The human-centric view encompasses the consumer-centric view; that's part of people's lives"

Sparking corporate imagination

A recent report from Kantar, *The imperative of imagination*, argues that while imagination may sound like reaching for the stars, it is actually a core competency for success. In our post-big data, post-pandemic world, the report says that insights are the spark of corporate imagination – and finding them means putting humans at the centre of things.

One business leader interviewed for the report described data as "people in disguise". Another said: "80% of our data is commercial; 20% is consumer. We lose sight of the people buying our products on a regular basis."

Insights must develop a richer diversity of data, resources and skills about the human experience, beyond the label of 'consumer'.

"The next step in customer centricity is really putting the human back at the centre, not the consumer," says J Walker Smith, knowledge lead at Kantar's consulting division. "The human-centric view encompasses the consumer-centric view; that's part of people's lives – we do consume; we need products; we like ads, frankly, and we don't really dislike digital – but there is more to it than that."

Smith says that marketers needed better analytics 15 years ago. Today, however, he feels marketers need greater empathy about the human situation and the lived experience of people as they go through their day-to-day lives. He cites Colgate-Palmolive's work in North America as an illustration of a brand pivoting to become more human-centric. Lifestyle research showed how difficult people were finding it to remain upbeat in a world that seems to be lurching from one crisis to another. On the back of this insight, Colgate introduced its 'Smile' campaign on the power of optimism – allying the brand with a lifestyle idea rather than a traditional category one, with the underlying message that Colgate is on people's side.

Wellbeing leapt up the corporate agenda during the pandemic and, together with regulatory and environmental, social and governance pressures, has meant that the C-suite is more inclined to consider the human dimension than was arguably the case four or five years ago, even when introducing business model changes in response to volatility and new opportunities. Those who do are steering a smart course. A report from the University of Oxford and EY, *The future of transformation is human*, found organisations that put humans at the centre of their transformation journey are 2.6 times more likely to be successful than those that do not (73% chance of success versus only 28%).

The human-centred organisation, defined

According to IBM's framework on the issue, the ideal organisation is a human-centred one. Perhaps that stance is a little surprising for a technology-focused business, but there is evidence from analysts that organisations with a human-centred design outperform those that don't prioritise people in terms of higher revenues (McKinsey report in 2018) and the speed at which they deliver outcomes to market (IBM research from the same year).

IBM defines a human-centred organisation as one that exists to fulfil a purpose for its users, customers and community, and orients all of its innovation and operations activities around those people. It has instilled the principles of human-centred design and sought to apply them to every aspect of the organisation.

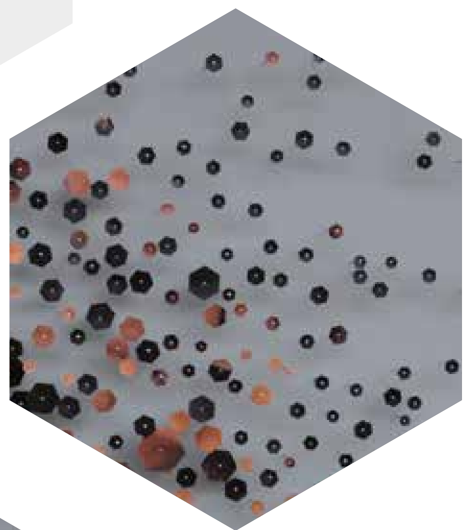
A human-centred organisation:

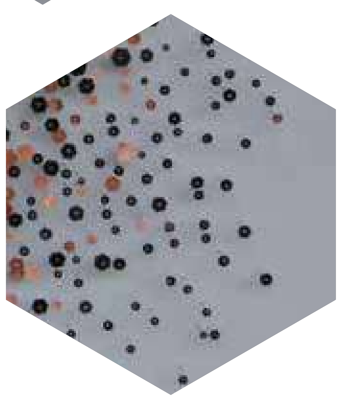
- Focuses on creating better human experiences
- Builds resilience and de-risks innovation through continuous iteration and learning
- Cares as much about the experience of its diverse, empowered teams as it does about its customers
- Intentionally, actively embeds these principles into the fabric of the organisation.

IBM accepts that 'building this organisation is ongoing; a utopian ideal, if you will, that we continually strive to meet'. A focus on human outcomes is essential – for example, by allowing users/customers to actively participate in the design and delivery of their experiences and by measuring success against metrics relevant to users, customers, or the broader community of stakeholders, rather than just those specific to the organisation.

Conversely, underperforming transformations don't invest enough up front in the rationale and/or emotional elements of design.

This move to new business models could result in storytelling being given its rightful prominence in the context of insights, says Graeme Lawrence, global managing partner at InSites Consulting. In discussions with global clients about what they are trying to achieve, Lawrence says he has heard aspirations such as '70% of the time should be spent on socialising the insights, 30% of the time should be finding them'.





In general, he sees the client side increasingly picking up on the need to be more human-centric, and feeling "a lot more empowered to do that by being closer to the analytics and making some of the data aspects their own, so that they can tell those stories". Success, he asserts, will depend on empathy. Ways of achieving that will vary.

"Let's not get hung up on the methodology *per se*; let's get hung up on making sure we can get to those stories for those datapoints and helping the client socialise that," says Lawrence. "As an industry, we can be a bit academic and talk about the methods quite a lot – yes, they are relevant; yes, it's down to the client-agency dynamic to try to choose the best ones. We must make sure we have recruited participation in the right way. Do we need to do some social listening and other cultural cues first?"

Getting to the stories

The desire for a better understanding of people's lived experiences has led some to question the effectiveness of tools such as brand trackers, asking whether they are capturing enough of the right information. It has also resulted in some brands taking a fresh approach to audience segmentation.

That was certainly the case for Virgin Media O2 (VMO2) which wanted to go beyond segmenting on the basis of factors such as how much data people wanted, as segments such as this could be equally well served by any of the other providers in the mobile/broadband category.

"Segmentations often fail because stakeholders don't believe in them or know how to use them," says David Watts, consumer insight lead in VMO2's insight, strategy and planning team. "If we were to succeed, we would need a framework that could help us target audiences effectively, innovate meaningfully and, ultimately, be something that the business would look to for inspiration, direction and confidence."

Human-centric design was paramount, and VMO2 worked with Incite (not to be confused with InSites Consulting) to create psychological safety for stakeholders. As Watts explains, this gave them "licence to speak candidly and express their needs, hopes and fears, allowing us to determine how the segmentation could be plugged into the practices, processes and culture of the teams".

The team looked at how people make decisions, using qualitative research underpinned by behavioural economics. This included looking at individuals' relationship with technology and the home, the context in which a device and data connection becomes an important part of their lives.

On top of this personal dimension, the team explored a social dimension, delving into how tech-savvy people consider themselves to be and the extent to which they are seen as an authority in the area by friends, family and

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> "Nobody recognises in themselves how much of an impact other people have on their decision-making"

colleagues. "These factors play more into our decisions than we in research have historically recognised," says Jonathan Stone, director at Incite. "We'll survey people, speak to them one on one or in a group environment, but what gets played back is the rational 'this is what I want, this is what I need'. But, actually, nobody recognises in themselves how much of an impact other people have on their decision-making."

Additionally, the research looked at people's situations – for example, family relationships and spending priorities, including the way the product would be used and how people would be perceived for spending that money. The segmentation is now guiding VMO2's three-year strategy and, says Watts, feeding every planning decision the business makes.

Health with humanity

Consumer healthcare company Haleon (formerly the consumer healthcare arm of GSK) has recently positioned itself as a business that brings together human understanding and trusted science, with the tagline 'For Health. With Humanity.' In line with this, it needs to engage with healthcare professionals (HCPs) – pharmacists, dentists and GPs – to find the best way to connect with them on a personal and professional level.

Haleon asked Ipsos to run a digital ethnography project with pharmacists (and later dentists, with GPs set to come next) to look at how they operate on a day-to-day basis – how they run their pharmacy, the patients they see, and the products they sell. But it also had a more personal side, looking at the strain the pandemic put them under, their role in the community, and how they dealt with Covid-19 at home.

Research was conducted across India, the US, the UK and Germany, and involved pharmacists filming themselves, plus online interviews, to get real insight into the practitioners' lives – for example, the pharmacists filmed not just their pharmacies, but also their local community and family life.

"We ran through tons of footage of pharmacists' experiences, collated it, and showed all of this over a day

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to lots of different people at Haleon so they could feel what was going on in each market," says Oliver Sweet, head of ethnography at Ipsos. The work informed the creation of the company's 'HCP pledge', designed to be a human way to connect with HCPs. This includes seeing the person, not just the white coat, and helping to foster powerful moments between experts and patients.

More organisations need to undertake such exercises. There's a need to raise self-awareness of insight gaps, to ensure people are at the heart of the process.

Empathy gaps need to be overcome, says InSites Consulting's Child. "Part of it is still that age-old problem that the people designing products, services and experiences don't look a lot like their customer base. How do we burst that bubble for them?"

The answer, according to Child, lies in techniques that bring about closeness, which equates to time spent with real people in real-world scenarios. That may span from self-recorded video and audio ethnography to live chats and face-to-face meetings. "Finding ways of bringing humans into direct contact with the teams will be really important," he continues. "As agencies, we could also get a lot better at seeing our role as championing the human condition to organisations. We need to be ambassadors of what the human condition is."

"As agencies, we could get a lot better at seeing our role as championing the human condition to organisations"

This means using techniques that highlight where some of those disparities are and call for "more triangulation", more talking to client teams about their expectations, attitudes and behaviours, and making direct comparisons between these and what the customer does. InSites has done work along these lines with the Co-op, which has businesses spanning grocery, funeral care, insurance and legal services.

"Within insight and research, it's our job to bring real people into the business to inspire and challenge stakeholder thinking – enabling them to understand our customers, members and colleagues deeply, beyond simply seeing them as a sales prospect, a number on a spreadsheet or in a chart," says Sarah De Caux, lead analytics and insights manager (customer, member and colleague research), Co-op.

"We spend loads of time engaging with stakeholders to bring these human insights to life and we're immensely proud of how we are influencing our culture and nurturing a customer, member and colleague-centric mindset. This is particularly important now, during a period of transformation for us, against a backdrop of challenging trading conditions and when so many of our customers, members and colleagues are facing a cost-of-living crisis."

Burst the bubble and get up close with people

It's a cliché – but sadly an accurate one – to say that marketers live in a bubble. They often assume they think and act like the consumers they are trying to appeal to, and they make assumptions based on their own experiences and perceptions. As a result, they might struggle to understand the perspective of someone with a different opinion, which can prevent them from developing empathy for the real people that make up a target audience.

Our role as insight professionals is to help organisations and their leaders – marketers and market researchers – understand what matters. We believe this starts by stepping into the real world. Only then can we see, feel, hear and experience how people really are, and start to close the empathy gap. Yet understanding what matters by ourselves is not enough. We must enable stakeholders to come on the journey with us, from where they are now to greater connection, immersion and empathy with their end users, buyers and prospects. Understanding comes when organisations put real people at their heart.

We know that some businesses are at the start of this journey, while others are further along. Technology helpfully lowers the barrier to entry to consumer insight on this journey, offering direct access to and interaction with people through online discussions, video diaries or self-ethnography. As the experience and needs of a business evolve, we can guide our clients from the safety of digital research into the wilderness itself, where immersions and safaris provide a more holistic, 3D, 360-degree human perspective. We can move seamlessly from a passive interaction to a more active collaboration.

But wherever a business is on its journey, we help clients to not just collect, observe or witness human behaviour, but also to activate the subsequent insights within organisations and ensure that meaningful, focused changes occur as a result. We tell the stories that matter, to the people who can make a difference, to inspire change.

Stories make us human. Regardless of research methods, we have to find those stories to help clients to act. Only when we act upon our understanding can we help people make decisions that matter.

Laura Hunt, senior business director, InSites Consulting


InSites Consulting
WHAT
MATTERS
TO PEOPLE IN 2023
In a year infused with distress, instability and vulnerability, where we struggled through crisis after crisis, people are now searching for meaning. In 2023, people will recalibrate their roles and re-examine the world they live in and how they live in it. They will seek purpose and meaning, whatever the context.
Based on cultural and macro analysis, collaboration with leading-edge consumers, and a 17-market quantification, we reveal 12 'trends' that matter to people.
See the world through their eyes.
Download WHAT MATTERS for free at
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Out of the ordinary

Research has helped to challenge perceptions of Marks and Spencer's clothing and define a new target audience for the retailer, as **Jane Simms** discovers

The greatest strength of Marks and Spencer (M&S), widely regarded as the bellwether of the British high street, has arguably been its greatest weakness too: everyone knows it, nearly all households shop in it, but it has historically tried to be all things to all people. For example, around 22 million people – nearly one third of the UK population – shop for clothing and homeware at M&S every year. Some of them, however, do so only once.

M&S is in the middle of a turnaround programme designed to make itself more relevant to more people – and, crucially, to persuade customers to shop with it more frequently and across its considerable range. This has involved addressing perceptions that while the food is fabulous, clothing – and to a lesser extent its homewares – is dull.

The retail sector took a battering during the pandemic lockdowns of 2020, but M&S capitalised on the sharp drop in footfall by focusing more closely on its turnaround strategy. Nowhere was this attention more important than in customer insight, which embarked on its own transformation in the spring of 2020.

Paul Burditt, consumer insight manager in clothing and home (C&H), explains: "We had more time to think very carefully about how we were structured and what our roles should be, in order to contribute in the most effective way to helping the business to develop its strategies to meet the objectives of the overarching five-year plan."

The new customer insight team for C&H launched at the beginning of 2021 and embarked on a programme

“We continue to see people seeking out simplicity… people are buying fewer clothes but want durability and versatility”

that has put insight at the heart of the business and strategy, which, in turn, has allowed M&S to accelerate its programme of change.

The team has approached this through a combination of work to determine what customers want from C&H, and defining what it describes as the ‘modern mainstream target customer’. They worked hand-in-glove with the C&H managing director, leadership team and business units (for example, womenswear, menswear, childrenswear, lingerie, beauty, home and dot.com) to embed insight into everyday decision-making at all levels.

Burditt joined M&S during the second week of the first lockdown in early 2020. Reporting to head of customer insight Tamsin Robertson, he leads all the retailer’s primary and secondary research, as well as trends, predictions and forecasts. “I’d regularly be asked ‘how’s this bit of the lockdown going to play out in terms of customer behaviour and intentions?’ and would find myself mining government legislation to try to unpick what on earth was going on,” he recalls. Three colleagues head up data insight, strategic market insight and category insight, with three others supporting with analytics, ad hoc and voice-of-the-customer research, and internal communications.

The clothing and home and food divisions are almost two separate businesses at M&S. “Shoppers have different missions, mindsets, frequency and attitudes when they’re shopping for each,” explains Burditt. Nevertheless, one of the new insight team’s first major pieces of research was a joint ‘state of the nation’ project with food, aimed at gaining a definitive understanding of some key customer trends. First conducted in 2021, and updated in 2022, it yielded valuable insights about how customer behaviour is changing.

“One trend was an acceleration in confidence with omnichannel,” says Burditt. M&S was slow off the mark when it came to online shopping, but upped its game rapidly during the lockdown. “Our customers, regardless of age, are shopping in an omnichannel way, and we have to be there for them at all the different touchpoints,” he continues. “They come into the stores to get ideas and they love the physical shopping experience, but they also value the convenience, speed, and sheer range and volume of stuff they can get online.”

However, Burditt acknowledges that the trade-off between convenience and privacy might tip in favour of privacy ‘in a year or two’ as consumers start asking to be ‘left in peace’ – by brands as well as government and institutions. He notes that people are currently shopping more in store and using cash in order to keep a careful eye on what they spend.

Other trends include a greater desire to shop locally – reinforced by rising petrol and transport costs – and to be part of a community. People continue to crave ‘wellbeing’, whether through exercise or cocooning.

“We also saw (and continue to see) people seeking simplicity – and that is playing out in clothing,” he says. “People are buying fewer clothes but want durability and versatility, and they are looking to retailers for ideas and inspiration to help them achieve that.”

This particular insight was reinforced in a separate major research project, also in 2021, which identified eight key customer priorities that formed the basis of the three-year plan for C&H. Not only did the C&H managing director and leadership team sign these off, but they have also planned in significant time every month to ‘talk all things customer insight’ with the insight team, says Burditt. “That director-led immersion in what the customer wants, and how that plays out in the business, is really important in keeping customer-related discussions live,” he adds.

The discussions also inform strategy development at an individual business unit level, every season, he explains. “Our market and consumer insight influences their buying, merchandising

The M&S 'Anything but Ordinary' advertising campaign launched in 2021

and marketing strategies, and ensures they keep the customer at the heart of their plans."

There's certainly plenty to talk about. Burditt estimates the insight team conducted – or commissioned – around 300,000 customer interviews, whether one-to-one, in-store, in focus groups, in-home, or in surveys, in 2021/2022.

"We conduct both quantitative and qualitative research all year round, using a range of different methodologies," he says. "We use a range of different agencies too, so that we can get a mix of points of view, attitudes, and different ways of thinking and approaching questions and problems."

One of the insight team's strategic research partners is Jigsaw, with "a breadth of engagement across all subject areas, from strategic projects for international business, to issues-based research on things like sustainability, to brand work, to more tactical 'straightforward' research projects", according to Burditt.

M&S worked with Jigsaw on a pivotal piece of research that has led to a completely new approach to communicating with customers.

"We thought it was fundamentally important to ensure that everyone knows who the customer is"

Burditt explains: "Instead of complicated segmentations or recourse to demographics, we wanted to create a more unified view of the customer that would help all the different teams in the business, including marketing, to really understand who their customer is, what's important to them, and what motivates them, and how that flows out in terms of what they want from clothing and home."

The unreliability of age-based targeting struck him two years ago in a focus group, where women in their 60s complained that M&S clothing was 'for older people'. "That was a clear message about the extent to which we catered for their style needs."

He and his team worked with Jigsaw to create 'a view of the customer' (see case study boxout), which was used to inform the 'Anything but Ordinary' campaign launched in autumn 2021. Burditt's team continually conducts quantitative and qualitative research with customers, working with Jigsaw, Acacia Avenue and YouGov, to understand how the campaign is meeting its fundamental objective – that is, 'to move the dial on style perceptions'.

The team also challenges itself to find different and better ways of ensuring the customer voice is heard at all levels, thinking about how to embed insight in the business. "We thought it was fundamentally important to ensure that everyone knows who the customer is," says Burditt.

They now make data accessible in a variety of ways. For example, a portal offers everyone access to the latest insight, information and research, while customer insight data dashboards feature a panoply of market and customer-related trends and data, which can be run on different time periods, interrogated, exported, and augmented by the insight team in response to ad hoc requests.

In June and November 2022, they ran full-day "insight fests" – showcase events, where the insight team, its agencies, and some customers presented on key customer themes to four groups of more than 200 colleagues.

Other efforts include monthly 'lunch and learn' sessions and visits to stores to talk to customers directly.

For Burditt, operating in a competitive retail environment necessitates the succinct articulation of research. "Insight is about having a point of view about what the data is telling you, and being able to articulate it in ways that our stakeholders find helpful, useful and actionable," he says.

And is it working? All the research points to the same conclusion, says Burditt: "Customers recognise we are on a style journey and that things are moving in the right direction." These findings are reflected in sales, according to the market-share data M&S receives every four weeks for the clothing market. Burditt says: "The 'Anything but Ordinary' campaign has been a significant factor in M&S growing its market share again. Our most recent data, from Kantar WorldPanel, shows we achieved our highest market share for sales for that time of year in four years."

He admits the past two-and-a-half years have been "a bit of a blur", but while the results so far are, he says, "really positive", he's not one to rest on his laurels. "We have a huge opportunity to shake customers up a bit more, to encourage them to cross-shop the whole range, including food. There is a lot more to do."

Marks & Spencer (clothing & home) won Research Live in-house team of the year at the 2022 MRS Awards

As part of a bid to 'democratise' data the C&H team ran 'insight fests' in 2022

The modern mainstream consumer

M&S has traditionally scored well with customers for the quality and value for money of its clothing, but its style scores lag some competitors (according to YouGov BrandIndex tracking data). Its product ranges were improving, but it wanted to raise its fashion credentials among shoppers.

Ann Morgan, director of research agency Jigsaw, explains: "Because M&S has such a wide customer base, it traditionally chunked it up by age. But that doesn't really work in clothing or homeware, and it knew a different approach was needed. For a start, it wanted to understand what its customers have in common. So, we explored their lives, their values, the way they think about themselves and their world, and we found there was a lot bringing M&S's target audience together."

There were two waves of research in spring and autumn of 2021. This work found that, in essence, M&S shoppers are family focused, active, work hard, love home, and enjoy holidays and socialising. They are also honest and responsible, caring and style conscious.

Jigsaw used the insight gleaned from the first 20 'pre-task' long interviews to define different style types that worked across the range of M&S shoppers, and what these meant in terms of shopper needs and choices. The second wave looked at how the style types drive shopping missions and needs, and how these vary across the calendar.

Jigsaw worked with the brand's insight team to distil the granular understanding of customers into a picture of the target 'modern mainstream consumer'. This then informed the development of the 'Anything but Ordinary' advertising campaign by House 337, which reflects the diverse customer base.

Morgan says: "The campaign is really strong visually, but it also conveys a fresh and credible message – that M&S deserves a fresh look, and is modern and on trend without being so 'fashion forward' as to put off its more traditional, loyal customers. It tested well, in both Jigsaw and Acacia Avenue research, among all ages, genders and other demographics – who felt it showed M&S going in a new and welcome direction."

Teeing off

LIV Golf is golfing's newest – and most controversial – format, and is building a data and insights team to match its growing status and attract fans of the sport. By Liam Kay

> **"Brand-building work was needed to understand what golf fans liked and didn't like. We were going to disrupt the status quo"**

It is rare that the genteel world of golf is at the centre of debate. But on 17 March 2022, former golf star Greg Norman announced that a new series of tournaments had been created, with prize money of $255m and radical alterations to the traditional format and structure.

If that wasn't controversial enough, the tournament is being funded by the Public Investment Fund (PIF) of Saudi Arabia.

LIV Golf's emergence grabbed headlines across the world and attracted robust opposition from the sport's governing body, the PGA. Since then, a series of tournaments has emerged, taking place from Bangkok to California and many places in between, rivalling the PGA's dominance in the sport.

Creating a new format in any sport is incredibly hard. Cricket has seen the Indian Premier League (IPL) and, in the UK, The Hundred emerge, with new teams and a mission to build huge franchises and fan bases from an almost standing start. LIV Golf has a similar focus on teams of golfers and has had to hit the ground running, while also facing serious resistance from within the golfing world.

Building insight

Just as LIV Golf has had to create a new format for golf from scratch, its insights department has also had to be set up at rapid speed. Ross Antrobus, vice-president, insight, analytics and loyalty, joined the business in February 2022 from the Football Association – where he was head of behavioural insight and business analytics – ahead of the March announcement. With the first event due to take place in London on 9 June, there was a lot of work to do to get an insights function up and running to help shape the tournaments.

"There wasn't an insight function, but there was a huge desire for insight to be present within the organisation," Antrobus says. "We hadn't heard from any golf fans or spoken to any golf fans. When I came into the business, brand-building work was needed – understanding what golf fans did and didn't like about the status quo. We were going to disrupt the status quo and be the antidote to some of those ills."

Two streams of work needed to start straightaway; the first to get a short-term understanding of fans' views, both those watching events in person and those viewing through streaming content. The company also needed longer-term analysis to help with negotiating broadcast packages and attracting sponsors for future years – while 2022 was a test year, with free-to-air content, it is envisaged that 2023 will have more traditional sports broadcast deals in place. This also meant using insight to help defend a fledging – and controversial – new brand from its opponents.

"We needed to look at what we gathered in 2022 to allow us to tell compelling, data-led, insight-led stories," Antrobus says. "At the same time, we are not without our detractors – we are not everyone's favourite 'new kid on the block'. A big role of insight here is how we use insight to protect and promote the brand. How do we get proactive news stories out there about what we are doing that contain data to prove our point?"

Antrobus likens building the insight function in this environment to using a microscope and telescope at the same time, and adds he found it "hugely exhilarating" working out how to collect data and set up the research operation quickly and creatively.

The speed at which the organisation was created necessitated working primarily with agencies, of which two – 7th Sense Research and Blue Yonder – were tasked with live reporting during the early events. The company has also worked with suppliers including YouGov Sport, MTM Sport, Toluna, Critical, The Point Insights and Mindprober. The research team has conducted post-event analysis mainly in-house, and social media monitoring through the Talkwalker platform.

A 'small and busy' team is now in place, with Adam Lawson joining as insights manager and an intern based in New York. Antrobus expects that the team will have at least doubled in size by autumn 2023.

Driving range

Eight LIV Golf weekends took place in 2022, with 14 set to take place this year. Each of them has needed fan data to be collected and analysed continuously

throughout the weekend, with data from day one helping to shape days two and three of the event. The company held all-staff meetings every evening on an event weekend to analyse what worked and what did not, and where improvements could be made. Antrobus says quantitative and qualitative data was ready for those meetings 90 minutes after play finished.

The leadership team also gets regular insight updates on issues such as fan sentiment, as well as information that could provide good media talking points. "We do the right work at the right time to make sure we always have data to hand that can help our agendas and give people good speaking points," Antrobus adds. Other areas of focus include broadcast ratings, social media growth and following, and sponsorship exposure. Most of the senior executives at LIV Golf come from organisations that are very data orientated, Antrobus explains, which has helped the insights function hit the ground running.

While there is no insight portal yet, because of the relatively small size and newness of LIV Golf, the research team share insights work across business once it is complete. "Once you get known as the person or people who might be able to answer a question for someone, you suddenly become the place everyone wants to come to," Antrobus says, adding "it is not just about how you drive the business forward, but how you get the business to invest".

Each tournament has qualitative fan forums post-event – sometimes with up to 20 participants – with senior team members invited to attend on the understanding that they make themselves available to answer any questions.

"I've never been a fan of keeping data to myself," Antrobus says. "I want people to come to see and listen to fans speak in their own words about our brand and events – the fans can express it far better than I can. The return on that is that I ask them politely, but sternly, to attend the debrief afterwards to discuss what we do with what we have learnt."

"I want people to come to see and listen to fans speak in their own words about our brand and events"

The quick turnarounds needed to allow LIV Golf to evolve – Saturday and Sunday fan forums are often discussed on a Monday morning – mean the insights team has had to be more willing to share incomplete information. Antrobus says that, sometimes, 75% of the right answer at the right time can be better than 100% of the right answer at a much later date, especially during a hectic golf season. "That immediacy of reporting in this business is needed and much appreciated," he explains. "We need to be slightly more accepting of partial data and partial answers so we can deliver at the right time."

There's a need for flexible working, given the global nature of the tournaments, with matches having been played in the US, the UK, Saudi Arabia and Thailand.

"I don't need people to work 24 hours, seven days a week," states Antrobus. "But I do need people to approach it with an open mind – you might be on a 3am call to Bangkok, but then you can make sure your afternoon is clear and catch up on sleep."

LIV Golf has used insight to help combat criticisms about its role in the world of golf and its Saudi Arabian funding. Antrobus says his work with the communications team has focused on using data to support its narrative, either through providing evidence to counter criticism of the organisation, or demonstrating how the game of golf was "poorly served" by its previous stakeholders.

LIV Golf has altered the game's format in a bid to appeal more to fans, such as having shorter events with more music and entertainment and more of the sport's big names appearing.

"You will read articles about how we are divisive in golf and not good for golf," Antrobus says. "But one of the first pieces of work I did was with golf fans in the UK, the US and Japan to understand what they did and did not like. They said it takes too long, you don't see enough golf in traditional coverage, and it is a bit traditional and 'stuffy'."

Working with Mindprober, the company has also used galvanic skin response and body temperature measurements to examine how fans engage with broadcasts and to analyse how effective it is at fan retention.

There are lessons to be learned from elsewhere. Cricket has seen several new leagues and formats over the years, some of which have proved majorly successful.

"The good thing with sports fans is that they are often fans of other sports," Antrobus says. "When you look across at the IPL or The Hundred, part of that offers reassurance that fans are open to innovation. You can tap into that from a research point of view and you can show some of those as examples in research, as a shortcut."

The future priorities are building on last year's successes with attracting fans and sponsors, and creating more of an emotional connection with fans over the longer term. LIV Golf is also trying to establish how it can build a following for its teams. It has golfers working in teams, and the challenge has been that most of the teams have no geographical 'hook' to persuade fans to support them. The insights department will, therefore, be examining the 'back story' for each team over the next six months.

Then there is building greater knowledge of the brand's image and potential sponsorship opportunities. "We're keen to demonstrate that we're a brand not just for expensive watches, champagne and fancy cars, but also, if you're an online streaming or gaming platform, we've got a brilliant audience that over-indexes in that world – and if you're a fledgling fashion or lifestyle brand, a lot of our audience is exactly the audience you're looking for," says Antrobus. "That is a new story for a golf brand to tell, and they are brands that wouldn't normally knock on our door, and wouldn't expect us to knock on theirs. We have done a lot of work to bring those audiences to life and demonstrate their value."

The challenge for LIV Golf is how it can use insights to help transform golf, and to defend the company from concerns about PIF's role in the years ahead.

Work on building the brand is ongoing, but the PIF funding and Saudi Arabia's involvement is still a major element of the story, and remains extremely divisive, with some fans happy with its impact on the game and others concerned about the potential for 'sportswashing' the Saudi regime.

"We are offering a relevant, engaging alternative to golf that has sat unchanged for too long"

"We have never shied away from where our investment has come from," says Antrobus. "We have not hidden that from fans. We have done work through social media and media monitoring to look at how other people are talking about us.

"All you can do is be honest where the money comes from. Some people will not be happy about that and will never be happy about it. But we are not using it to take other golf away from them.

"We are not trying to preach to people that we are better than anywhere else. We are offering what we feel is a relevant, contemporary, engaging alternative to golf that has sat on a shelf unchanged for too long and was starting to be left behind by other sports."

Owning it

Owned channels are set to grow in importance for brands, research from Mesh Experience and the Institute of Practitioners in Advertising has found. By Fiona Blades

For years, we have spent time creating sophisticated models to measure the effectiveness of paid advertising. Yet advertising may represent only 30% of brands' experiences. Last year, the Institute of Practitioners in Advertising (IPA) effectiveness leadership group turned its attention to owned channels, and Mesh Experience was invited to partner in exploring this territory. We uncovered a vast, fertile landscape for brands. Beyond desk research, we conducted:

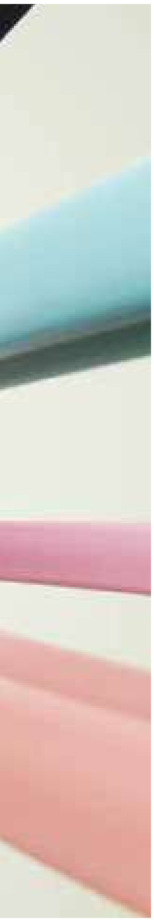
- Interviews with more than 20 industry leaders, spanning a range of brand and agency owners in Europe, the US and Latin America, during May to August 2022
- Analysis of Mesh Experience data, including proprietary data on retail banking and client data on sports betting and retail beauty.

Why are owned channels growing in importance?

Without exception, every industry leader interviewed believed that owned channels would grow in importance. Headwinds and tailwinds are pushing owned channels into the limelight.

One catalyst for the IPA to commission the work is the rise in first-party data. This is the gold rush of our day, accelerated by technology, and allows companies to have direct relationships with customers – an increasing priority given the demise of cookies and increasingly restrictive legislation.

At the same time, modern consumers choose which brands they spend time with and there is declining attention and a proliferation of media channels. Advertising can struggle to cut through. Diageo's Thebar.com is a strong example of a new owned channel – instead of numerous brand websites in countries around the world, the drinks company has created one digital home where people can be inspired by recipes and purchase.



Seven key findings and implications

1. The debate around owned-channel definition

Most people agreed a brand's website is owned, but what about a brand's social media channels? Many felt these were brand-owned – but the real estate is owned by Meta. Emails were usually regarded as owned but, from a customer perspective – when bombarded by them – they can feel like paid advertising. In general, it was felt that owned channels were those controlled by the brand. However, brands can't control the experience people have with them. The customer might be delighted with their first website interaction and frustrated on a later visit. It is these experiences, which happen in context, that we need to measure.

2. Evolving frameworks

The initialism POEM (paid, owned, earned media) was frequently mentioned as useful to marketers and others in the company for thinking beyond paid advertising, while some preferred OESP (owned, earned, shared and paid). Knowing where a firm is in a journey can help select the most relevant framework to move thinking on.

3. Put creativity and business outcome first

To engage people in a world with declining attention, creativity is vital. DDB North America president and chief executive Justin Thomas-Copeland explained how the agency helps clients find the 'spaces' where brands have a right to play. In award-winning work for Coors Light, DDB painted black roofs white, reflecting 85% of sunlight and taking the idea of 'chilling' to a different level. Elsewhere, Direct Line Group has embraced agile working and its head of insight, marketing effectiveness and customer experience, Ann Constantine, explained how this enables business outcomes to be the focus, rather than channel, with diverse-skilled teams harnessing their combined creativity. Focus on creativity and put business outcome – not channel – first.

"To engage people in a world with declining attention, creativity is vital"

4. Understand which owned channels to build and which to harness

Using owned channels may seem to be lower-cost. However, Andre D'Abreu, head of customer intelligence, research and strategy at Latam Airlines, pointed out that by not monetising the loss of attention, we are not accounting for true value. It may seem low-cost to send out lots of emails, but if open rates decline, you have eroded value. Equally, Diageo's global marketing effectiveness director Kiel Petersen explained the investment that goes into creating immersive brand homes, such as The Guinness Storehouse in Dublin and the Johnnie Walker House in Edinburgh. Companies should think about what capital expenditure to deploy in the creation of new owned channels and what to harness through operational expenditure.

5. Build measurement ecosystems with the whole experience in mind

In analysis of Mesh Experience data, we discovered that owned channels represented 63% of retail beauty experiences, but only 37% of sports-betting experiences. Having an owned-channel experience had a much greater impact on brand metrics, such as brand consideration and net promoter score, than paid, but paid media still plays a vital role.

We also saw how different owned channels impacted on brand perception. Banking apps, for example, positively impact on perceptions of the brand as reliable and hassle-free, whereas branches impact on fair and friendly perceptions. Purchase had a phenomenal impact on brand consideration, suggesting that it shouldn't be seen as a 'sale', but as a brand-building touchpoint.

6. Think relevance first when it comes to owned channels

With advertising, it is important to engage the person, then provide a relevant message, for the experience to be persuasive. With owned channels, the experience must first be relevant (if the person is interrupted with something irrelevant it will be off-putting), then positive, in order to be persuasive.

7. Consider new metrics

Building owned channels means building for the long term, moving beyond measuring return on investment to brand impact, focusing on the customer-brand relationship. Businesses should consider new key performance indicators, such as share of experience and return on experience, to help focus on investing into the customer experience to generate brand growth.

Owned channels are the next frontier for marketing effectiveness measurement, but not the final one. We see a world beyond channels, a place where these distinctions no longer matter. Businesses that embrace owned channels will lead on this journey.

Fiona Blades is president and chief experience officer at Mesh Experience

Threats and opportunities

To mark the 10th anniversary of *Impact*, I am taking a look at five present threats and five opportunities for the next 10 years. Several real and present dangers are influencing the world around us:

1 Inflation and the cost-of-living crisis
The combination of higher food, energy and mortgage or rental costs will hit the lowest paid disproportionately hard and could cause social unrest beyond the public sector strikes that have been a feature of post-pandemic life. Businesses will need to increase salaries by at least 5% or to the extent that they can pass on wage inflation alongside higher raw material, freight and energy costs to their end users. Those with real pricing power will succeed, others will fall by the wayside.

2 From energy crisis to energy independence
Today's energy crisis is likely to impact Europe and the euro negatively over the next two to five years, but will also create opportunity. In contrast to the US, which is self-sufficient in energy, Europe has to import most of its energy requirements and, as commodities are priced in dollars, it suffers the double whammy of higher euro costs (now for the first time around dollar parity) and importing inflation into an already recession-hit environment.

3 High interest rates are here to stay
The market expects rates to stay above 3.25% after 2024, which will hit corporates and any leveraged asset classes.

4 Supply chain fragmentation and deglobalisation
Advanced economies have persistently under-invested as a share of gross domestic product, reflecting a need for large future capital outlays to catch up.

5 Conflict in Ukraine and China
The spectre of conflict creates risks, opportunities, and questions about the ethics of investing.

Against this macroeconomic and geopolitical instability, innovation and creativity offer future growth and opportunity.

1 Augmented reality and extended reality
These platforms of the future have not reached critical mass yet. There has been significant investment by Meta, Apple *et al*, but the metaverse remains five to 10 years away. There is no obvious 'killer app', but business-to-business applications are beginning to emerge.

2 Accelerating artificial intelligence (AI)
AI technology is reaching into wider areas of life. Its ability to generate 'creative' output has reached commercialisation stage with big implications for the creative industries, writers, animators and photographers.

3 Autonomous vehicles
Regulation may be slowing down deployment in the west, but China is full steam ahead with autonomous vehicles, with long-haul freight, buses and taxis prime candidates. What does this mean for future productivity, car ownership, and pollution?

4 Quantum computing
This is solving in seconds problems that would take a standard computer hundreds of years to solve, and addressing a large number of solutions at once to consolidate the 'best' one. There are implications for drug discovery, weather forecasts, financial modelling, material discovery and cyber security.

5 Healthcare innovation
Personalised healthcare is about to reach widespread adoption, with gut microbiome, continuous monitoring of heart rate variability to glucose, personalised drugs, computer vision (CT and MRI scans), treatments derived from computational advances (data and process), and psychedelic treatment commercialisation.

Present threats and weaknesses create future opportunities and strengths that will drive long-term sustainable growth. Throughout history, mankind's instinct for survival and ingenuity in the face of near-destruction has led to reinvention and progress. Necessity is truly the mother of invention. Never underestimate *homo sapiens*, Latin for 'wise human'.

Out in the cold

Transport-related social exclusion prevents people from fully participating in their communities, and new data analysis has shed light on the scale of the problem in England. Katie McQuater reports

An estimated 3.3 million people in the north of England live in areas where there is a relatively high risk of social exclusion as a result of limitations in transport – equating to a fifth of the region's population. That stark figure is the result of data analysis from Transport for the North (TfN), the body responsible for making the case for strategic transport improvements across the north.

In its report, *Transport-related social exclusion in the north of England*, TfN defines transport-related social exclusion (TRSE) as 'being unable to access opportunities, key services and community life as much as needed, and facing major obstacles in everyday life through the wider impacts of having to travel to access key destinations'.

The impacts of TRSE can contribute to a cycle of poverty, isolation and poor access to basic services. Furthermore, the issue disproportionately affects people with disabilities and long-term health conditions, people with caring responsibilities, and those on low incomes and in insecure work, reinforcing wider patterns of social and economic inequality.

TRSE is caused by a number of factors: fragmentation, unreliability and high costs of public transport; poor conditions for walking and cycling in car-dominated environments; and a resulting high level of car dependency. However, a lack of evidence means it has historically been difficult for authorities to accurately measure the scale of the problem.

Tom Jarvis, senior evidence and analysis officer at TfN, says: "There was a large evidence gap when it came to precisely assessing what an inclusive transport system looked like in the north of England."

To better understand the issue and establish which areas of England are at a higher risk of TRSE, TfN carried out primary research, working with Social Research Associates and Temple, and developed a data tool combining accessibility analysis with a range of socio-economic and demographic indicators.

Identifying causes and consequences

Initially, TfN began by looking at its data on access to employment and then combined that with socio-economic and demographic datasets to create a score of 'vulnerability to social exclusion'.

"We knew the focus on employment was relatively narrow, but a key purpose of that first data analysis was to identify a set of areas in which to conduct primary research," explains Jarvis.

Following the initial analysis, primary research – involving a quantitative survey of 3,000 people, 300 qualitative interviews and 11 focus groups – sought to examine how TRSE manifests in specific place and population contexts, and the lived experience of those affected. Jarvis says: "That gave us a really clear idea of the causes and consequences of transport-related social exclusion in the north."

The data analysis guided the development of the primary research, allowing TfN to get an insight into the types of areas that might be at higher risk of TRSE and focus their research on those areas.

Jarvis then conducted further work on the findings to develop the second version of the data tool, which reflects a broader accessibility analysis, factoring in access to healthcare services, education and other services, as well as employment.

The tool measures the risk of TRSE at the layer super output area (LSOA) level, a geographical unit for small area statistical analysis, and can be used to estimate the size of the population living in the areas indicated to have a higher level of risk. The data published in TfN's report covers all LSOAs in England, including regional comparisons of the overall risk of TRSE and of the accessibility and vulnerability elements that comprise it.

Jarvis says: "One of our key findings is that there are very large variations between the regions of England, and the north east really stands out as having a very high level of risk of TRSE – 31.5% of the population of the north east live in areas with a high risk, compared with 21.3% of the population of the north and 16% of the population of the rest of England."

“We wanted to identify areas with a risk of social exclusion because of issues with the transport system”

The biggest challenge posed by the analysis, according to Jarvis, is in the interpretation of the results.

“We were quite keen on how we presented the data in the report to say that our claim isn’t that 3.3 million people in the north are currently exposed to this, but rather this is the population living in areas with a high level of risk, based on the combination of access to stability and vulnerability.”

Developing the analysis

A further challenge in presenting the data is that the areas at risk of TRSE don’t necessarily align with what might be found by examining indices of multiple deprivation.

Many areas with high levels of deprivation have reasonably good transport links, for example, because they tend to be in urban centres.

“That was a challenge in developing the analysis early on,” says Jarvis. “Initially, our approach combined an accessibility score and a vulnerability score, meaning there are areas with very high vulnerability but quite good transport links that were indicated as having a high risk of TRSE, and we didn’t see that as a totally satisfactory outcome. We wanted this tool to identify areas with a risk of social exclusion specifically and primarily because of issues with the transport system.”

It’s why, he explains, the researchers developed a threshold analysis approach to the TRSE risk categories, which meant that an LSOA needed to have high vulnerability and poor accessibility to be classified as having a ‘high risk of TRSE’.

The final version of the data tool allows for a comparison of the variations in risk across the north of England in a way that wouldn’t otherwise be possible without “an absolutely humungous survey dataset”, says Jarvis, by expanding the findings over a wider geography.

Other than insights from the primary research, the data tool didn’t uncover any impact from Covid-19 travel disruption, as the data used is from 2019, but TfN plans to run the analysis again once new data on deprivation and accessibility are available this year.

With talk from recent governments of ‘levelling up’ investment in the UK’s regions, the report paints a compelling picture of the challenges facing the transport system in the north.

Acting on the findings of the research, TfN is currently developing a wider policy agenda of transport interventions with the aim of supporting a more inclusive and effective transport system. At the time of going to print, it was preparing to launch a consultation on the strategy.

The data tool, available on TfN’s website, can be used to aid decision-making for local authorities and transport stakeholders.

Jarvis says: “We suggest using this tool as a guide to highlight areas where the analysis suggests there is a higher level of risk of TRSE, and then use that to complement and back up local intelligence on what’s required in particular areas.”

Tearing down barriers

Yet again, I find myself sitting here, staring at an empty page on Word, trying to work out how best to talk about the latest thing that's annoyed me about our industry. Don't get me wrong, I love working in research and analytics, but sometimes...

The source of my ranting this time is the colossal gap that is too often found between analytics and research, or even analytics and the rest of the world. A gap that, realistically, just shouldn't exist; that makes my job, and many others' jobs, much harder on a day-to-day basis. Yep – that one.

I was attending a talk by a respected analyst on a fascinating subject – and when she got to talking about the nitty-gritty of what she was doing and how she was doing it, there was an awkward pause. Her eyes shifted around the room, and then to the floor. She started her explanation with, "Well, I have to admit..."

Her confession? She was using Microsoft Excel for some of her analysis. That's it.

She felt the need to admit she was using Excel – like it was some sort of big, dirty secret. Something people shouldn't do. You see the same tool snobbery time and time again, and it's safe to say it drives me mad.

There are hundreds, if not thousands, of tools out there you can use to help with your analytics. From R, Python and SPSS to (dare I say it) Excel – and there isn't one tool that is better or worse than the others. I definitely have my favourite tools for certain tasks. Horses for courses, if you will. But pretending that we're somehow above using a tool that is arguably a bit more mainstream does us much more harm than it does good. It doesn't make us look even cleverer; it just builds barriers. Barriers between us and the people who need to understand the recommendations we're giving after the data analysis stages. Huge walls between us and the next generation of data wranglers.

"We need to inspire people to want to play with numbers, to find it interesting enough to want to give it a go"

I've said it before and I'll say it again – people, generally, struggle with numbers. Many see an analyst's work as intimidating, confusing, full of jargon, and beyond their reach because "I was never any good at maths anyway".

It's our job to tear down those barriers. We need to be making our work more accessible to the wider population, not the opposite. We need to be able to explain our findings, and how we got there, in a jargon-free and accessible way.

We need to inspire people to want to play with numbers, to find it interesting enough to want to give it a go – not keep up this crazy façade that what we do is complicated and technical, and only the very few gifted individuals among us will be able to understand.

If we're able to do a piece of solid analysis in an accessible tool such as Excel, we should be shouting about it, not hiding it with shifty eyes and hushed voices. The more we can get people to engage with what we're doing, and how, the more we will engage them in our insights and our recommendations – and the more clout our work will have in the wider world.

It's as simple as that. It's high time, as an industry, we stamped out this behaviour for good. Stop using complicated techniques when simple ones will give the same output. Stop using confusing words when it distracts from what is actually important. Stop pretending we don't all use Excel for the odd pieces of analysis.

It's high time we got over ourselves.

Fear and loathing

Threatening language is prevalent across the internet, so researchers have developed a 'threat dictionary' to track its impact on those exposed to it. By Liam Kay

The world feels increasingly unstable as the years roll by. A pandemic, the war in Ukraine and an increasingly toxic political environment are just some of the factors that have raised anxiety levels and decreased optimism across large swathes of the population. Portents of doom abound online, decrying the latest supposed threat to humanity.

What is the cumulative impact of this torrent of bad news? Does it change people's outlook on life, society, their fellow human beings and country? One recent study by researchers at the University of Maryland and Stanford University looked to understand the implications of threats broadcast through mass communication channels in the media and online. They used a computational linguistic tool to index threat levels from text, allowing the researchers to examine how the prevalence of threatening language in the media over the past century has impacted cultural, political and economic shifts.

Michele Gelfand, professor in cross-cultural management and of organisational behaviour at Stanford University, and one of four lead researchers on the project, says that the study came about because of a dearth of available tools and evidence on the subject. "We have been studying the impact of threat on human psychology for some years, but we realised there were few methods developed to track threat in real time in public media and its impact on human groups," she explains. "We wanted to also develop this tool so that people can use it in their own lives – for example, to see how much threat talk one is exposed to when online or when listening to speeches or reading the newspaper."

The research team created a 'threat dictionary' to help develop a semantic measure that tracks the form, frequency, and magnitude of communicated threats. This involved scanning documents for the presence of select keywords, identified through a technique to determine how words related to the concept of 'threat' cluster together across different platforms, such as Twitter, Wikipedia and raw webpage data website Common Crawl. The researchers identified 240 words, including: attack, crisis, destroy, disaster, fear, meltdown, outbreak, suffer, tension, toxic, unrest, unstable, and violent.

"Developing a threat dictionary can help us detect threats in many settings in real time and track it across many years," Gelfand explains. "It can be used in a variety of settings, from analysing the impact of threat on the stock market and examining how leaders use threat to motivate, to understanding how threat spreads across platforms online, among many other uses."

In this study, researchers used the dictionary to examine trends across US newspapers over the past 100 years, and found a general reduction in the prevalence of threatening language over time, with spikes for various major events, such as wars, pandemics and global catastrophes. For example, World War I and II both caused a significant spike in the model, and similar trends were seen for events such as the terrorist attack on the World Trade Center in New York in 2001. But even with these three events, threatening language did not rise above that seen at the turn of the 20th century, reflecting a broader march towards a more peaceable existence.

The prevalence of threatening language in the media

has other impacts, too. "Threat talk, whether real or imagined, has predictable consequences," explains Gelfand. "It tightens cultural groups and makes them more 'group oriented'; it relates to conservative shifts in voting and xenophobia, and it relates to lower stock-price performance and lower innovation."

Gelfand says that the relationship between cause and effect in these cases could be blurred, with threatening language sometimes a cause of societal tensions and sometimes an effect of major crises, such as World War II or the 2020 pandemic. For example, poor stock market performance could be triggered by news of threats, while market downturns could also cause an uptick in threatening language appearing in the media.

"Threat talk relates to conservative shifts in voting and xenophobia"

In an increasingly more dangerous world, what about the next few decades? Will we see a continuation of positive trends from the 20th century, or will there be rising tension across the world and, as a result, an upsurge in the use of threatening language?

The research also modelled responses for two decades into the future – broadly until 2040 – using an autoregressive integrated moving average (ARIMA) statistical model, which uses previous trends to make predictions about the future prevalence of language contained within the threat dictionary. The result? A gradual rise in threat levels, closer to those seen in the first half of the 20th century, reflecting an upwards trend in threat levels from the past eight years. It should be noted that the trend is uncertain and should be interpreted carefully; there is no guarantee of a more dangerous future ahead. But given recent world events, rising tensions look a safer bet than usual.

What's next for the research team? "We're working to see how threat talk is motivating extremists in online settings," Gelfand says. "We're also interested in analysing how news programmes differentially use threat talk and how this affects their viewers. We'd like to expand the dictionary so it can be applied to other languages." With plenty of economic and political turbulence on the horizon, there is undoubtedly scope for further investigation.

Virginia K. Choi, Snehesh Shrestha, Xinyue Pan and Michele J. Gelfand, 'When danger strikes: A linguistic tool for tracking America's collective response to threats', *PNAS*, Vol. 119, No. 4, January 2022

Defaults are not always the silver bullet

Defaults are sometimes considered the poster child of behavioural science because they are one of the surest ways of changing people's behaviour.

The concept of creating a default option or changing the default option is one of the most powerful nudges in any behavioural scientist's toolbox; the idea that when people are presented with a predetermined default option, or are automatically enrolled, they tend to accept it. Examples range from default passwords (few ever change their Wi-Fi password) and browsers, to standard insurance packages. We accept the status quo and go with the flow, without considering other options or investigating further, often because we see the default as an implicit recommendation, either because it's the option most people would choose or it's the option suggested by experts.

Broadly, behavioural scientists have found that default settings are likely to be most effective when:

- The default is seen as an implicit recommendation
- The decision is complex and unfamiliar
- The individual does not have a clear preference for any option
- The decision is dull or not seen as worth the effort.

One of the most well-known applications of defaults is enrolling people into pensions. Here, employees are automatically opted into a scheme by their employer, although they can always opt out if they choose. Research conducted in the US by behavioural economists Brigitte Madrian and Dennis Shea found that auto-enrolling employees into a retirement savings scheme raised enrolment from 49% to 86%.

Yet, researchers have now identified contexts where defaults that initially appeared to be a good solution to changing behaviour ultimately backfired because they were overly ambitious, triggering consumers to override the default. Defaults that try to stretch consumer behaviour too far in one direction may have a negative impact on behaviour as consumers revert to their original behaviour, or even beyond.

Three topical examples illustrate why defaults may not always be the behavioural change silver bullet:

Energy

Households prefer a home that is warmer than the default temperature on smart thermostats. In this cost-of-living/energy crisis era, we're often told that we can save energy by turning down the thermostat. Smart thermostats such as Nest and Hive market themselves on this by highlighting how consumers can save as much as 20% on energy costs by learning and adopting new household behaviours, and recommending optimal heating temperatures usually lower than societal norms.

However, a study by behavioural scientists Robert Metcalfe, John List and colleagues found Californian households over-rode their smart thermostat's programmed temperature settings so frequently that they failed to make the energy savings predicted. Most households initially programmed their thermostats to the default recommended levels, but over-rode these settings once or twice a day, particularly in the early morning or evening. The default temperatures seemed to be too low or too high for households, meaning any gains were more than cancelled out.

Account overdrafts

People who regularly access unarranged overdrafts prefer to opt out of policies that protect them from high overdraft fees. Bank charges for overdrafts on current accounts cost consumers billions; in 2016, UK financial firms gained £2.3bn in revenue from overdraft fees. Most of the revenue comes from unarranged overdrafts, which are used by 14% of consumers. While some people find it a source of convenient, if expensive, credit, others don't intend to use it and go into the red by accident.

The situation is similar in the US and, in 2010, the government decided to tackle the problem. It implemented a policy stipulating that banks could not automatically charge fees for unarranged overdrafts by default unless customers had opted out. Any debit card purchases that would push checking account balances into the red would be declined. Policymakers assumed that customers would prefer to stick to the default, yet, in reality, many people opted out, especially people with the highest tendency to use overdraft facilities. Among people who used unarranged overdrafts more than 10 times per month, more than 50% of them opted out. One factor at play was that consumers tended to be over-optimistic about their ability to stay in the black, opting out even though they had previously taken advantage of overdraft facilities. Many simply preferred the convenience of easy credit, even at high cost.

A better solution might be a default alert. In the UK, customers are alerted by simple automatic reminders as soon as they access an unarranged overdraft. In a recent trial by the Financial Conduct Authority, those who received an automatic alert when they strayed into the red paid fewer charges than those who received no alerts, because the alert often prompted customers to take immediate action to get back into the black.

Pensions

People prefer to pay less than the default rate into their pension if it is set too high.

Finding the optimal 'sweet spot' rate at which to set a default pension contribution is difficult. Once enrolled in a pension, many programmes, including those in the UK, set a default minimum contribution rate that people must save each month. Set too low and people won't have enough to retire on; set too high and people will find it so painful to lose so much of their income that they may opt out of a pension entirely.

One trial of different UK pension contribution rates found that only 25% of employees accepted a default savings rate of 12% – the level recommended by experts, but relatively high compared with current contribution rates. Median take-home pay per month was around £2,650 in 2021, so 12% would mean paying more than £300 into your pension per month, a figure that many would baulk at, especially right now. In the trial, 60% of employees shifted down to a lower contribution rate. By setting the default rate too high, people may end up saving less than if the default rate had been more modest.

Implications:

- Default options are powerful tools for quickly changing behaviour – as long as they are applied in the right context.
- If implemented too ambitiously, such as default savings rates or home temperature settings, they may impact in the wrong direction, and people's choices and decisions may boomerang.
- To avoid this boomerang effect, it pays to explore consumer preferences: what do they like and not like; how do they behave in different contexts; how do they organise their finances, their healthcare, their home life?
- As learning evolves around these core behavioural science concepts, it is the nuance of understanding that makes them even more powerful.

"Researchers have now identified contexts where defaults that initially appeared to be a good solution to changing behaviour ultimately backfired, because they were overly ambitious"

Understanding biometrics in research

The International Organization for Standardization and International Electrotechnical Commission standards bodies have defined biometrics as the automated recognition of individuals based on their biological and behavioural characteristics.

Biometrics is a biological measurement – or set of physical characteristics – that can be used to identify individuals. It uses a variety of technologies that mobilise probabilistic matching to recognise a person based on their biometric characteristics. Biometric characteristics can be physiological features – such as a person's fingerprint, iris or hand geometry – or behavioural attributes, such as a person's gait or keystroke pattern.

As biometric characteristics are generally unique to individuals, they can be more effective and reliable at uniquely verifying the identity of individuals compared with other methods – for example, traditional verification systems such as a password or personal identification number.

One key advantage of biometric technologies is that they cannot be as easily shared, lost or duplicated as passwords or physical identity.

As such, biometrics are increasingly used in identity management. For example, a large range of technology companies employ mobile biometric authentication for their products or for the use of apps. At present, biometric data is largely employed for the purposes of human authentication.

Biometrics has traditionally existed in the silos of physiological and neuroscience studies, and in user experience or user interface design. However, businesses have caught on quickly to the wealth of information that biometrics can produce. As a result, they are moving toward matching this data with website usability tests to deliver masses of information.

"Businesses have caught on quickly to the wealth of information that biometrics can produce. As a result, they are moving toward matching this data with website usability tests to deliver masses of information"

What does biometrics in market research look like? A typical scenario could be:

- Sample is recruited and brought to a focus group facility or market research setting
- The participant is asked to don galvanic skin-response sensors on one hand
- They are then asked to surf through a website. They may be sitting next to a researcher who asks them questions, or they may be self-directed so that the research team can see how they naturally navigate through their experience
- Depending on the technology employed, they will either have face sensors attached or their responses and eye tracking will be captured through video
- The results are added to the data collection, which will later be sorted and analysed by the business commissioning the study.

In the case of neuromarketing market research, biometrics has several applications that are used to understand research subjects' cognitive and emotional responses toward certain stimuli.

Biometrics market research gives researchers an opportunity to observe and map subjects' responses toward a certain product or service without disrupting the process. The results gained from the research are usually accurate, as most biometric systems aim to gauge the subconscious part of the mind, therefore producing an almost pure, untainted response – although there are caveats to this.

As mentioned above, during the research process participants may be asked to surf through a website while seated next to a researcher, who asks them questions (this, of course, causes interference), or they may be self-directed, so that the research team can see how they naturally navigate through their experience. While biometric data goes beyond the cerebral cortex (the conscious mind) into the subconscious, it is still useful to remain inquisitive about the shortcomings of

biometrics and continue to test its application and success. Though we may desire it, biometric technologies are not an infinite source of information. Tools used in biometric market research include:

- Functional magnetic resonance imaging, used to measure the activity in the brain caused by changes in the blood flow
- Electroencephalogram, used to measure changes in brain-wave activities
- Observational analytics, involving examining participants' reactions toward a certain stimulus.

What are some of the risks?

Biometrics can pose challenges to privacy. Although biometrics is not intrinsically incompatible with privacy, how systems are designed and used determines the extent to which it improves or contravenes people's privacy.

A key challenge facing the adoption of biometrics in market research is consent. This is typically based on a transactional model – in short, individuals are able to make choices about the use of their personal information, such as what information is collected and when, and how it is used.

However, if the collection of biometric information is passive, it is unlikely that individuals can provide explicit consent (as is required by General Data Protection Regulation legislation) or exercise control over the type of data collected, how it is used, the general subject of the data collection, or the purpose of the data collection, particularly special category and/or criminal convictions data. Simply put, individuals may not know what exactly is being asked of them.

Biometrics has vast benefits for market research, advancing and enhancing data collection and the quality of the data. However, there are critical questions to consider with the adoption of biometric use, such as cost and privacy requirements.

MRS is currently preparing a guidance document on biometrics for researchers, set to be available during 2023.

Serving up ideas and inspiration

The new year starts with an injection of ideas, innovation and inspiration – an inoculation of best practice to ward off the January blues. The inspiration comes from the winners and finalists of the starry MRS Awards 2022, which took place in December.

MRS is spotlighting award-winning case studies through our 'Research Inside' advertising campaign that will demonstrate where research and insight has led to change for the better, in both commercial and public sectors.

So look out for #ResearchInside on social media and via our emails and publications. Each link leads to a gem of a case study offering practical advice for replicating the effects of the research in your organisation.

Another antidote to the apathy of deep winter is the promise of the annual conference, now only two months away, on 14 March. Our conference theme is 'Insight Alchemy: The secrets of turning survival into growth'.

The conference builds on the concept MRS has brought to the research sector over the past 12 months – that there is a formula for research excellence that combines magic and science. I hope you will join us for an intense and transformative experience as we explore the magic formula over the course of the day and help you completely reassess how you go about the business of research. Tickets are limited, so make sure you book your ticket to Insight Alchemy 2023 now.

If you still find yourself in need of a warming cup of good practice, make sure you get hold of a copy of the *Research Live Industry Report 2023*. You'll find the MRS League Tables listing the top research organisations by turnover as well as the fastest growers. Also included are interviews with clients with their forecasts, an analysis of buying trends for the year, and analysis of the gender pay gap within the research sector.

We have also included lists of all those who have signed up for the MRS Inclusion and Net Zero pledges, so you can see who is really committed to driving change in our sector.

I hope that's enough to bring some warmth and inspiration into your workplace but, as ever, if you'd like to contact me for more ideas on how MRS can support you and your business, please drop me a line.

I wish you well and look forward to seeing you in 2023.

Sector and MRS news

The research apprentice

There are different paths to develop a career in research. Read Abbie's story about finding an apprenticeship right for her and her first year in research as a market research executive apprentice at Ipsos. The apprenticeship scheme was launched to attract new and diverse talent into the insight sector. See Abbie's story on mrs.org.uk

Research Inside – making decisions better

There are many case studies demonstrating the positive impact that research has on design and decision-making, both in the commercial and public sectors. Research Inside highlights a few brilliant and innovative ways where research makes a difference. Share the communications and celebrate the impact of research using the hashtag #ResearchInside

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

Wellbeing in the sector

See the Wellbeing in Research survey and resources

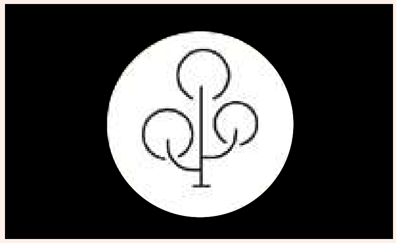
Wellbeing continues to be high priority post pandemic and in the midst of a cost-of-living crisis. The 2022 Mental Wellbeing in Research Tracker shows some improvement in mental health across the industry. However, 83% of researchers still reported negative mental wellbeing. As an MRS member, you have exclusive access to premium content and events with wellbeing experts providing practical tips on how to care for your body, mind and soul.

Membership Mark

Demonstrate professionalism with the special mark

Ensure that you have downloaded the 2023 Membership Mark to demonstrate your expertise and membership credentials. You can use this mark on your LinkedIn profile, CV and email to show that you are a recognised member of MRS. With all members signing up to the MRS Code of Conduct, the mark also highlights your commitment to best practice in research to customers and employees alike. Access the latest mark in your MyMRS account.

Training and development



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As an MRS member, you have access to the widest, most relevant range of research, insight and analytics training globally. We've expanded our 2023 offering by adding self-awareness courses to the leadership, methodology and insight courses, to complement the whole person development. Members also benefit from up to 30% off each training programme – almost covering the cost of your annual membership when you take a course in 2023.

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- 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

Class of 2022

Congratulations to the following research professionals who were awarded an MRS Qualification in 2022

Diploma Awardees 2022

Research Academy
Susannah Ludlow

The Market Research Study Centre
Sarah Marquis

Advanced Certificate Awardees 2022

Ipsos UK
Sophie Allen
Giorgina Altomare
Rosie Carr
Alistair Davey
Saskia Epstein-Tasgal
Thomas Gilbert
Elena Hotson
Lucy Hou
Malou Jacobsen Someya
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Anna Reed
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7

Will Johnson **is chief executive at The Harris Poll, one of the longest-running US surveyors of public opinion. He is a board member of Tutoring Chicago and a member of The Economic Club of Chicago and the Young Presidents' Organization**

1 What attracted you to the polling industry?

My background has always been in research. My interest in polling dates back to my undergraduate studies, when I researched the emerging political significance of the millennial generation. Most associate polling with elections and campaigns, but its usefulness transcends politics. Overlaying insights extracted from polls across other data, such as observed behaviour, allows us to dig even deeper into several underlying social phenomena.

2 Is the polling industry held in high regard by the public in the US?

We recently surveyed public trust in the polling industry, and while public opinion polls aren't often a go-to information source for Americans, most (59%) still consider them to be trustworthy. More importantly, polls – compared with other information sources, such as national, local and social media – are considered among the most trustworthy by their users. Nearly nine in 10 consumers of public opinion polls find them trustworthy, matched by local news users (87%) and exceeded only by people the respondents know personally (93%).

3 How has Covid-19 changed public opinions on a permanent basis?

The forced move to remote working and increased time at home unleashed an unparalleled wave of resignations, which has altered the nature of the US labour market. As many companies are implementing rigid return-to-office plans, employees who have worked from home for more than two years are using their historically strong leverage to negotiate for continued flexibility. Employees expect more from their companies now, and those expectations are here to stay.

4 Do you think society in the US is irreparably divided?

No. While discourse is loud and often unhappy, human beings are intelligent and complex – capable of holding nuanced views. We've found Americans, generally, are for Black Lives Matter and against defunding the police. Both those positions may stand as being synonymous with supporting the Democratic and Republican parties, but the reality is that most Americans do not fit neatly into two camps from issue to issue. Polls dating back decades reflect similar levels of concern about divisions in American society, and this concern seems to be a feature – not a bug – of democracy.

5 How should brands respond to the current political climate?

When it comes to navigating specific issues, brands must first examine how close the issue is to what the company does. For example, it makes sense for healthcare providers to be vocal about policies impacting their standard operations and their patients. But the further removed from the company's line of business, the more caution its executives should exercise before speaking out on lightning-rod issues that may alienate key stakeholders. With that in mind, you can't really go wrong with traditional corporate social responsibility efforts, such as service days and *pro bono* work.

6 Does the public have higher expectations from brands?

One of the more surprising pandemic trends has been the rise of business as one of the most trusted institutions in society. Expectations increase with expanded trust. A recent poll found that 68% of US adults think it's more important for companies to take a stance on social issues. In a tight labour market, even leaders of brands that don't interface much publicly are expected to lead with moral clarity more than in the past.

7 Can brands maintain a global outlook and satisfy local consumers?

Yes, keeping in mind that some local markets may occasionally require special attention. Executives can't be subject-matter experts on all the external factors impacting their businesses, so it is important to engage a balanced team of consultants to inform decisions as they relate to key markets and stakeholders.


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