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ISSUE 45 APRIL 2024

Using evidence & insight to make a difference

AI is making waves in research, but what are the skills needed to future-proof the sector?

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EDITORIAL
Editor
Katie McQuater
+44 (0) 20 7566 1862
katie.mcquater@mrs.org.uk

Deputy editor
Liam Kay-McClean
+44 (0) 20 7566 1864
liam.kay@mrs.org.uk

ADVERTISING
Sales & marketing director
Helen Oldfield
+44 (0) 20 7566 1842
helen.oldfield@mrs.org.uk

Sales manager
Alex Pout
+44 (0) 20 7566 1844
alex.pout@mrs.org.uk

PUBLISHING
Digital director
Christian Walsh
+44 (0) 20 7566 1861
christian.walsh@mrs.org.uk

Operations director
Nikki Bower
+44 (0) 20 7566 1851
nikki.bower@mrs.org.uk

DESIGN AND PRODUCTION
CPL One
+44 (0) 1223 378 000
www.cplone.co.uk

PRINTER
Geoff Neal

SUBSCRIPTION ORDERS AND ENQUIRIES
+44 (0) 845 194 8901
info@mrs.org.uk
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ADDRESS
The Market Research Society
The Old Trading House
15 Northburgh Street, London EC1V 0JR
+44 (0) 20 7490 4911
www.mrs.org.uk

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Point of difference

I was recently reminded of the importance of thinking differently. This year's MRS annual conference closed with a keynote interview with journalist Raphael Rowe, who talked about how his experiences of suffering had shaped his approach to work.

"The BBC employed me because I was different – because I did things differently and I thought differently.... Once I found my voice in that room, I became so powerful. It didn't matter that I couldn't articulate the story or pitch it in the way my colleagues could."

Although reflecting on his experiences in media, Rowe's point (see our conference coverage on page 14) felt pertinent to researchers, too. In a world swirling with conjecture and contrasting opinions, the sector brings a point of difference, bridging the gap between data and action.

In life, there has been a reappraisal of the ordinary. The pandemic years taught us that simple pleasures and interactions are to be treasured, and, as research from newspaper giant Reach has highlighted, community and connection are formed by shared, everyday experiences (see page 11). 'Deinfluencing' has even taken off on social media.

But simplicity shouldn't equate to blandness; to solve big challenges, organisations need to make the space for free thinking to thrive. Many talk a good game on diversity, equity and inclusion, but the numbers of those walking the walk are frustratingly small.

The world doesn't need more of the same. Organisations need people who think differently, people who can do things differently. Curiosity and critical thinking have long been fundamental tenets of research excellence. Paired with good business understanding and leadership, it's a mix that will be all the more valuable alongside the developments we're seeing in AI, as our report on this issue explores (page 26). But, as Bethan Blakeley observes in her column (page 43), calling for the industry to make so-called 'soft skills' a non-negotiable: "We need to go against the stereotypical grain."

This leader has been a difficult one to write, as it will be my penultimate one for *Impact*. As you may be aware, MRS is closing the print issue of the magazine to focus investment on digital content, and the July issue of *Impact* will be the last. Finding a link between that and what I'm about to say has been a little tricky and more than a little tangential, but bear with me.

The thing about a good magazine is not the medium – it's the ideas contained within its pages. The thing about insight is – methodological rigour aside – it should not matter where a good insight comes from.

The value lies in what can be done with it. What change, what action can be taken? What new understanding can be acted on? What transformation can be applied? *Impact* was launched in the first instance to celebrate and highlight just that – the ways in which evidence and insight make a difference. I believe it has done that, and more, in its 11 years under the current brand. And the editorial team will continue to do so, in a different way with Research Live (research-live.com). Thank you for all your support and readership over the years – and stay tuned for what's next.

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Know anyone that can reliably and consistently give you access to these audiences for both Quant and Qual research?

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World view

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

One in 20 UK internet users believe everything they see online

(p8)

“We seem advanced on equality, but we’re not”

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30% of UK online adults are unsure about the truthfulness of online information

(p8)

> “We look to fungi as a silent partner, not an extractive resource to be used”

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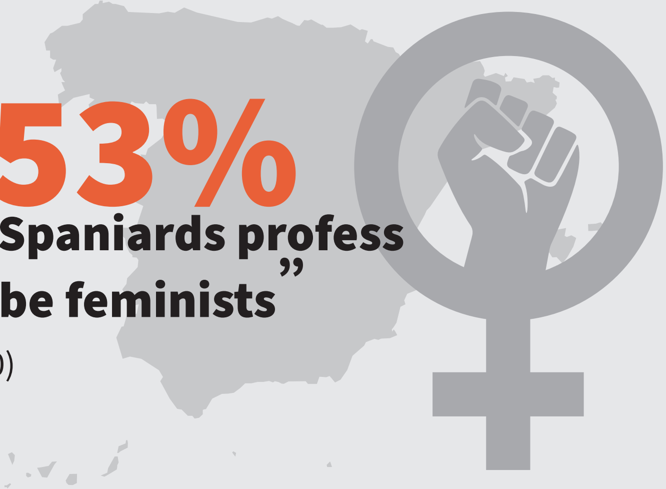

> “**53%** of Spaniards profess to be feminists”

(p10)

“Shared experiences are the mundane, everyday moments that are really overlooked – doing the school run brings parents together”

(p11)

At the ballot box

Almost half the world's population have the opportunity to vote in 2024. How is the polling industry keeping an eye on voting trends? Liam Kay-McClean **reports**

From Brussels, to London, to Washington DC, to New Delhi, Kyiv, Islamabad, Jakarta and Taipei, 2024 is shaping up to be a huge year for democracy. Almost half of the world's population are living in countries with elections this year, and around four billion people will be eligible to take part.

For the polling industry, the cataclysms of the poorly predicted results of the 2015 UK general election, 2016 US presidential election and Brexit referendum forced the industry to re-examine, recalibrate and reconvene for future elections. In 2015, the Market Research Society and the British Polling Council launched an inquiry into the UK general election polling deficiencies. The report, which was released the following year, suggested a failure to reach enough Conservative voters was to blame.

Since then, the polling industry has taken steps to address its overcounting of some sections of the population. However, the challenges for this year include not only those historical issues of voter representation, but also current fears about disinformation and future complications stemming from artificial intelligence (AI).

"Polling companies almost always conduct post-mortems and work out whether their weighting schemes or modelling decisions could have been better," explains Chris Hanretty, professor of politics at Royal Holloway, University of London. "That's helpful, and can identify improvements, but, sometimes, you end up fighting the last war and worrying about things that went wrong in the last election that won't be an issue this time around. At the same time, some new issues come up."

Jane Green, director of the Nuffield Politics Research Centre at the University of Oxford and president of the British Polling Council, says that some challenges cannot simply be addressed by changes in sampling.

"What's key here is differentiating between election upsets that are down to data and election surprises that are down to interpretation, narrative-building, prediction," says Green. "It's all the more reason for great care in how we talk about uncertainty and the complexities of public opinion."

The key is to make sure any lessons are learned quickly. "We should always bear in mind that, in many ways, people may not know for certain how they are going to vote right up until election day itself," adds Kelly Beaver, chief executive, UK and Ireland at Ipsos. "One of the key challenges for understanding voting intention is overcoming social desirability bias, where respondents may be tempted to say what they think we want to hear, or what might be 'trendy', rather than what they truly believe."

Risk and reward

How do we better predict elections? "Important insights come when we can use survey data to reveal preferences or corners of the electorate we didn't know about before," says Green. "In our British Election Study work, for example, I'm fascinated by the limitations of 'income' as a variable, and how we learn so much more in understanding people's feelings of economic security. In our separate recent intergenerational survey, we identified older voters who have younger family members who are struggling financially, and how that motivates greater support for policies that help younger generations."

Technology can also help. "Tools that promote representative sample collection and encourage active, attentive respondent participation are some of the fundamental technologies being leveraged to improve accuracy," says Alexander Podkul, senior director of research science at Morning Consult.

But, he cautions, there needs to be a careful calibration that is "not always fighting the last battle and not overfitting to recent historical data". He adds: "Are we contacting and representing respondents from different backgrounds, demographic groups and political persuasions? Being able to understand the population and use that insight in targeting respondents and incentivising responses is necessary for collecting representative, high-quality interviews."

Social media intelligence, online passive monitoring, biometrics, neuroscience and digital ethnography are all part of the

Misinformation is an issue. According to Ofcom research from 2022:

30% of UK adults who go online (14.5 million) are unsure about the truthfulness of online information

22% were able to correctly identify the signs of a genuine post

6% believe everything they see online

> **“What’s key here is differentiating between election upsets that are down to data and election surprises that are down to interpretation, narrative-building, prediction”**

modern polling arsenal. There is also a potential role for AI. The technology is particularly useful for generating automated insights from large data sources, but it could also be used to detect meaningful patterns in tracking data, prepare efficient and effective survey instruments, and prevent survey fraud, says Podkul.

The rise of large-language models (LLMs) represents an interesting turn in how we can measure public opinion, as they can be used to synthesise and distil open-ended text. James Crouch, head of policy and public affairs research at Opinium, says: “This would mean being able to quantify open-text responses much more quickly and without human bias or error. It allows for not just creative new data analysis, but also for new ways to ask questions.

“Pollsters can ask for people’s opinions with much less prompting and this allows for more off-the-cuff responses that may more accurately measure public opinion. It is close to some of the coding that many pollsters already do, but allows for more flexibility on a practical level.”

He sees a positive role for LLMs in freeing up researchers for the types of analysis and work that is most in demand from policy-makers and political parties. “They [LLMs] can speed up efficiency on some of the less glamorous jobs, such as pulling data together over time, meaning that pollsters can get a sense of long-term trends much more quickly,” Crouch adds. “Improved efficiency has a knock-on effect for what it actually means to do polling, as it may free up time from operational tasks for spending more time doing in-depth data analysis.”

Then there is the added challenge of disinformation. “Disinformation is, by its nature, a symptom of a highly connected and fast-thinking society. To see how far it has already spread, we can pinpoint who has probably been targeted by disinformation and quantify the scale of the problem,” explains Crouch. Polling companies can use insight about which groups are most hit by which pieces of fake news to inform strategies to tackle the problem, he adds.

At the time of going to print, a date had not yet been set for the UK general election, and the impact of AI and disinformation remains to be seen. Keeping up with an ever-shifting voter landscape will be the challenge shaping 2024 for pollsters everywhere.

Machismo's reckoning?

Sexism came to the fore with an infamous kiss at the Women's World Cup final last year. Sabine Stork, Silvia Artiñano **and** Diana Regidor **explore the divides in Spanish society**

Last summer, Spain seemed the epitome of a socially progressive European nation.

An Ipsos survey published in March 2023 found that 53% of Spaniards professed to be feminists, the highest proportion in Europe. In addition, the country has a higher percentage of female parliamentarians than the UK or the US.

Then came the Fifa Women's World Cup, won by a much-acclaimed Spanish team. And then came *that* kiss. The then head of the Spanish Football Federation Luis Rubiales' move to grab Spain forward Jenni Hermoso and kiss on her lips made headlines around the world. He later resigned and Hermoso filed a criminal sexual assault complaint against him.

Unlike in other countries, Spain's ideological divisions are highly visible on the streets and in out-of-home advertising. During last year's election, Madrid's Plaza de Callao became the stage for the so-called 'Battle of the Banners', where political parties rented huge hoardings to broadcast hard-hitting messages. Right-wing party Vox used the spaces to accuse Spanish prime minister Pedro Sánchez of releasing hundreds of sex attackers on the country's streets as a result of the *Solo sí es sí* – 'Only yes is yes' – law, which aimed to make consent an important factor in defining a sex crime, but also had the unexpected result of allowing some sex offenders to reduce their sentences.

Interestingly, this kind of combative communication has been appropriated by several Spanish brands, with a plethora of knocking copy lines. Heura, a manufacturer of vegan 'meat' splashed the message "*Una hamburguesa de carne contamina más que tu coche*" ('A hamburger contaminates more than your car') across its 18 x 14-metre banner. Galician water brands Cabreiroá and Fontecelta have gone to war in giant format – one of the latter's banners read, "*Podríamos decirte que somos la mejor agua de Galicia pero no queremos cabreiroar a la competencia*" ('We could tell you we're the best water in Galicia, but we don't want to piss off the competition').

This streetfighting tone was startlingly absent from the rather vanilla responses of the Spanish Football Federation sponsors to the Rubiales-Hermoso case. From our experience conducting focus groups on equality all over Spain, Arpo and Thinktank know that such equivocation certainly won't cut it for many Spanish women who think there is widespread discrimination in society.

"There's inequality in marketing, advertising, sales, on the streets, how you're treated, with salaries, with maternity rights. It's how men talk about you… the jokes, the language," says one Spanish woman.

Another notes that she was unaware that machismo was a serious problem in today's Spain until she became a mother. "When I went back to work after my second child, I realised my company didn't want me there," she says.

More conservative Spanish males, however, deny the experience of inequality – or even state that the pendulum has now swung too far in favour of women.

"I come from a small town in Andalucia and, in my family, I have never seen any kind of inequality between my father and my mother, or my sister and my brother – never," says one man. "We have all been equal in every sense. The way we have been treated, our rights, our duties. I have never witnessed any problem."

"Women have all the rights in the world," states another. "I mean, they have the same rights as I do, no less, no more. For me, it's not a conversation we need to have."

That said, there is also increasing awareness among Spanish men of the widespread discrimination the Women's World Cup has brought to the fore.

"Inequality is palpable in management," according to one man. "Sometimes, women quit or aren't allowed to hold positions. There's inequality of salaries. This doesn't mean that I earn more because I'm a man. It only means that there's still a long road ahead."

"What is missing is awareness and consideration in Spanish society," says another. "There are still jokes, comments and memes that may seem funny, but they aren't. We seem advanced on equality, but we're not."

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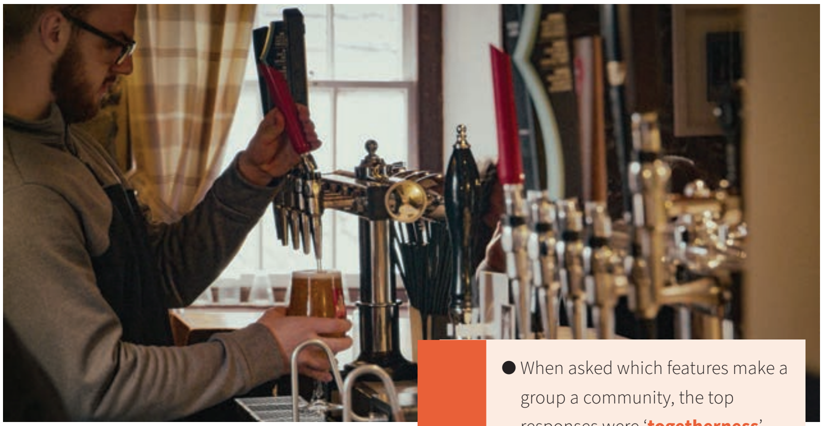
Sabine Stork is founding partner at Thinktank; Silvia Artiñano is managing founder at Arpo; and Diana Regidor is senior research analyst at Arpo

The ordinary life

Brands often seek to align with big cultural moments, but communities form through more mundane, everyday experiences, one study has found.

By Katie McQuater



- When asked which features make a group a community, the top responses were '**togetherness**' (55%), '**belonging**' (51%), '**shared interest or passion**' (46%) and **trust** (46%)
- **84%** agreed that 'shared experiences are important in the creation of communities'
- **65%** agreed that the pandemic made them appreciate the 'smaller, more ordinary' shared experiences in life

(Reach Solutions June 2022 base: UK adults n=2,026)

"'Community' has become such a buzzword," says Hanna Chalmers, founder of The Culture Studio, discussing the trend for brands and marketers to home in on 'communities', often with no understanding of either the term or the communities.

Research by The Culture Studio with newsbrand publisher Reach sought to explore what community means in the UK, how communities are formed and what makes them tick. "Post-Covid, everyone was talking about communities and everyone assumed that you would know what they were talking about, but we wanted to take a step back," says Jenny Shevlin, head of planning and insight at Reach.

A first phase of cultural analysis identified three types of community: fan, local and values. The research then faced a challenge: traditional recruitment fell down when finding communities for participant observation. "Initially, we worked with a very trusted recruiter, but they really struggled to recruit a community – because it is difficult to identify who the leaders of a community are," says Chalmers. To address this, agency and client regrouped to establish what sorts of groups within the three community types the publisher wanted to speak to.

The researchers identified a mix of fan-based, digital and physical communities, and gaining access took weeks, according to Chalmers. Access meant building a lot of trust with community members over numerous phone calls to reassure potential participants. The seven communities engaged for the ethnography were: a rural Welsh pub that had become a co-operative; a Bradford community organisation; a Liverpool FC football fan community; a *Love Island* fan community; an online parenting community; a Glasgow-based boxing club; and a Milton Keynes Men's Shed (a community space for men to connect).

One key finding from the qual, and later backed up in quant results, was that communities are formed around shared experiences – many of them ordinary ones.

Shevlin says: "The ad industry defaults to a shared experience in terms of big moments such as Christmas, Halloween or the World Cup final. What the research uncovered was that shared experiences are just the mundane, normal, everyday moments that are really overlooked – doing the school run is a moment that brings parents together, for example."

Another finding was the impact of government cuts. "All the communities talked about the fact that there's been a breakdown in funding to local communities and feeling that 'the state isn't here for us'," says Shevlin.

"There is a default towards [brands thinking about] communities as these joyful places – obviously they are, but a lot of these experiences that bring people together are pretty negative." For example, the boxing club set up to give kids something to do in the absence of shuttered community centres, or people forming a community because of fly-tipping on their street.

A few media agencies have started to pick up on this in Reach's presentations to the industry, adds Shevlin. "We tend to want to bury our heads in the sand and think about moments of celebration and joy, and that's what a brand can get attached to. But women having trouble breastfeeding, or kids taking drugs – these are difficult things. That's an interesting thought for agencies thinking about how their brands can get involved."

Did the research find any appetite for brands to step in? Chalmers says: "In the immersions we did and borne out in the quant, given that this gap had emerged because of austerity and Brexit, there is an appreciation that there is a gap to be filled. There is not a negative kneejerk response to the potential of brands getting involved; 68% in the survey agreed that, if brands are going to help, they need to understand communities from the inside out."

The research has helped Reach to build a "solid foundation" for its market positioning, and establish what it stands for as a sales team, says Shevlin. With 42 million monthly unique visitors and more than 130 titles, the company has started to explore how it can segment its audiences differently and is encouraging media agencies to think about target audiences beyond demographics.

A spore for success

Mushrooms are having a moment, and exploring the fast-growing global myco-culture shows that fungi can be valuable partners for market researchers in any field, writes Jess Jorgensen

I'm on a mushroom tour, researching myco-culture to explore how the 'shroom boom' is impacting consumer behaviour. As fungi become mainstream, the industry is still defining its norms. There are tensions as mainstream media publishes misleading information in catchy headlines; charlatans spew 'wellness' advice on Instagram; and, currently, there is little research for those wanting to look beyond the blogs but without the capacity to access digestible scientific studies.

After more than 40 ethnographies, I'm on the most challenging study of my career. Immersing myself in the mycological scenes of Southern and East Africa, Southeast Asia and the UK has revealed how fungi can become an ally, colleague and teacher.

Insights rely on valid and accurate data, often supplied through the goodwill and cooperation of participants. Given the importance of intersectionality and cultural appropriateness in global research, mushrooms have shaped my study design, considerations and methodology.

Mycophiles often speak of fungi as 'engaging us in conversation'. We look to fungi as a silent partner, not as an extractive resource to be used. For many mycophiles, mushrooms are our friends. As such, the roles of researcher and participant shift: rather than just an observer, I'm a collaborator and even a student. Participants are invited as partners in designing their ethnographies and as contributors to the reporting.

In Kenya, the objective was to understand the market's emotional relationship with button mushrooms, being a potential source of food security and economic equity. An elder female agribusiness maven worked with our fixer and mutual colleague to design her own ethnography. Before the interview, we connected over a farm tour and mushroom-themed lunch. We were well fed and, as is customary for this group, had blessed the meal by thanking the farmers for our food.

This simple act of building trust enabled her to divulge a deeply personal insight that fundamentally changed my understanding of the local mushroom culture. Shattering my initial perceptions of a mutually beneficial, emotional human-fungal relationship (perhaps biased by learnings from the UK and South Africa), she revealed a bitterness rooted in the challenges that farmers face. This insight is helping some Kenyan mushroom entrepreneurs to re-evaluate how brands communicate with a mushroom market looking for pragmatism over emotion.

> “For many mycophiles, mushrooms are our friends. As such, the roles of researcher and participant shift: rather than just an observer, I'm a collaborator and even a student”

Behind the scenes on a Kenyan mushroom farm

Similarly, in Uganda, it was imperative to demonstrate cultural awareness and sensitivity. In a refugee settlement populated largely by people from the Democratic Republic of Congo, the sight of Western visitors may not be an everyday occurrence. While preparing for field research exploring how refugee-led organisations work with mushrooms to build resilience and self-sufficiency, I invited our hosts to guide our behaviour and research discussion. This ensured the appropriateness of the topic guide to cover sensitive issues.

Global research encompasses a wide range of perspectives – even more so when studying mushrooms. Mushroom folk work at the intersections of ancient and modern practices, spanning food, health, materials, policy, environment and conservation.

My sample are myco-experts, mycophiles,

> “Research that respects local nuances can steer effective decision-making in global product development”

mycopreneurs and mushroom enthusiasts who exist as a decentralised global network. Like mycelium, the ‘wood wide web’ that allows fungi to communicate and share resources without a central control point, there’s no main mushroom governing body.

Mushroom circles understandably become more open when one displays a shared passion. To be trusted as an investigator, I must speak the lingo, know my death caps from my panther caps, and remain humbly a student.

I’ve accessed people beyond recruiter databases. In South Africa, where psilocybin (a hallucinogenic compound found in some fungi) is classified as illegal, interviewees referred through ‘mycelial’ connections proved essential to investigating flourishing underground psychedelic enterprises.

Building rapport ensures committed participation. If people feel the research is not relevant to their context, they may be less likely to take part, resulting in incomplete data or drop-outs.

In Vietnam, I had no budget for an interpreter, as the study is limited by self-funding. Impressively, participants proactively learned English mycological jargon for the research. This is testament to the investment and engagement of the mycological community when rapport is built. In Kenya, partnering with mycopreneurs gave me a week in-field and a network of mycologists (and its WhatsApp group), allowing me time to unpack the complexity of mushrooms’ multifaceted and intersectional impact.

Building trust and using culturally specific methods allows for deeper insights than a generic approach. As an analyst (and humble myco-enthusiast), this has become really important while addressing the study’s most significant challenge: navigating polarisation, misinformation and harmful ideas.

In ethical research, including all perspectives – even those you don’t like or agree with – is as important as removing personal bias. For example, tackling a controversial and polarising narrative around mushroom foragers being dubbed ‘eco-criminals’ in the UK and South Africa presented challenges. I could not have achieved objective results or a deeper understanding of the topic without foragers trusting me with their honest opinions.

These partnerships also mean I’m able to release occasional hot-topic myco-reports, with diverse perspectives on tough topics. Here, participants become consultants and collaborators in the reporting, ensuring culturally appropriate outputs.

What set out as an exploration into myco-culture has become a bank of insights on mycopreneurship, brand communications, audience engagement, informed consumer choices, and how to do solo global research into this growing niche.

Looking ahead, true collaboration with participants increases my chances of being welcomed back for future studies in the regions I have visited. Research that respects local nuances can steer effective decision-making in global product development or brand and communications strategy.

Involving participants as partners ensures cultural appropriateness – a valuable lesson for market researchers in any field, to avoid unintended harm, offence or misrepresentation. Insights from mushrooms can inspire market researchers to rethink their approach, emphasising mutual respect, collaboration and cultural sensitivity in their methodologies.

● Jess Jorgensen is a strategic insights consultant focusing on mushroom culture, who runs the *Running with Mushrooms* blog and podcast.

Connect and adapt

Members of the research sector gathered in London for the MRS Annual Conference 2024: Applied Transformation. From keynote speakers Raphael Rowe and Pippa Crerar, to sessions exploring generative AI and data quality, the day brought together new thinking, connecting the industry with key issues. Over the next few pages, Katie McQuater, Liam Kay-McClean **and** Ben Bold **report on some highlights**

Raphael Rowe: 'We shouldn't underestimate our audience'

Raphael Rowe is a journalist and presenter of *Inside the World's Toughest Prisons* on Netflix. "I am driven by the evidence and the facts – always have been, always will be – and so I don't give an opinion. I never have. I don't make judgement based on what I don't know," said Rowe in a keynote interview with Sinead Jefferies, outgoing chair at MRS.

Rowe spent 12 years in prison for a crime he did not commit – handed a life sentence for robbery and murder, which was overturned in 2000.

On leaving prison, he worked as a journalist, joining the *Today* programme and later moving on to roles at the *Six O'Clock News*, BBC Three and *Panorama*.

Audiences are discerning, Rowe said. "We shouldn't underestimate our audience. We live in an age when people can and do make judgements based on what's presented to them. If you want to spin them a line, spin them a line – you know and they know you're spinning them a line and you're not giving them the truth. People will believe what they want to believe. For me, it is not about whether people want to believe what they're being presented – it is what is being presented. They can make an informed judgement about what they do next, based on that insight."

He added: "It is about how you present the information and how you give over that insight. Then leave it for people to decide for themselves. Why do we have to control how people think and what they believe and shouldn't believe?"

Rowe said the BBC had employed him because he "did things differently and thought differently". "My purpose came from my own suffering – I was driven by the sense of injustice as my career developed," he said.

"Once I found my voice in that room, I became so powerful. I was in that room because I was different. I was given that opportunity because I was different. It didn't matter that I couldn't articulate the story or pitch it in the way my colleagues could."

Raphael Rowe

chnology that strikes fear into the hearts of some, um,
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me travel not the artificial uh

The keynote panel session tackled the issue of generative AI

Addressing concerns about AI

Leaders in the sector must work harder to bring the public and workforces with them on embracing the benefits and opportunities artificial intelligence (AI) could bring, according to a keynote panel session.

Kelly Beaver, chief executive officer at Ipsos UK and Ireland, (pictured, far left) said: "It is likely that your younger colleagues might be playing about with it [generative AI] a bit more, but they might also be increasingly anxious and worried about what it means for their own jobs and the tasks they are doing, which may be some of the tasks generative AI can help with.

> **"Your younger colleagues might be playing about with generative AI, but they might be anxious about their own jobs"**

"There's a real job for us to take the workforce and the general public with us on this transformation. That's not straightforward."

Beaver said that AI could help people do more impactful work, but warned that some people could end up losing parts of their job that they find satisfying. "There's a huge opportunity for our industry to be more AI-enabled across all aspects of the research life-cycle," Beaver added. "That's brilliant and scary at the same time. The teams enjoy some of the tasks – those are some of the areas where AI could be most impactful and take the hard yards away, but they are enjoyable hard yards.

"All research roles can be augmented and enhanced in some way by AI, but in different ways. It is every researcher's job to figure out what that is and make sure they are AI-enabled for the future."

Jatin Aythora, director of research and development at the BBC, (pictured, second from right) told the panel that around 80% of the current hype around AI is "just noise", but that the technology is fast developing.

"Generative AI has become a utility. The question is how that will change the different industries we work in. The focus needs to be on the unique value generative AI can deliver. It is an opportunity to rethink the way business is run. Generative AI is an infrastructure."

However, data transparency is crucial, he warned. "Every organisation that runs an LLM [large language model] should be publishing the data sources the LLM is trained on."

Restoring faith in public life

The 2024 general election will be "fought against a backdrop of very low public trust", said *The Guardian*'s political editor, Pippa Crerar, in a keynote presentation.

Crerar discussed her career in political journalism, in particular her work exposing corruption within the Conservative government and Number 10 during lockdown.

Before arriving at *The Guardian* in August 2022, Crerar was political editor at the *Daily Mirror*. It was while there that she was instrumental in unearthing the story of government adviser Dominic Cummings breaking lockdown rules and travelling to Barnard Castle.

"The story had an impact beyond the political drama," she said. "It dented faith in government at a really crucial time. UCL [University College London] did some analysis during that first summer of the pandemic, which found that public confidence in the government's ability to handle the Covid pandemic dropped sharply following the news that Cummings had broken lockdown rules.

"I'll be honest. I found it really hard to process the idea that our investigation may have led to people being less likely to follow the rules. But I also strongly believe that people who were asking so much of us should be able to make similar sacrifices themselves."

It was not all doom and gloom, however, and the notion of a recovering faith in politics is not a totally alien concept. "Trust in governments is quite volatile in Britain and can change rapidly in response to events," Crerar explained. "But there's one constant around election times, and that is that a new government has a big effect on boosting trust while a victory by an incumbent party does not. Perhaps a new government is a prerequisite to beginning to restore faith in public life."

She cited an Ipsos poll about trust of different professions, in which "only 9% of voters said they trusted politicians to tell the truth, compared with a lofty 12% in 2022".

"That's the lowest it's been since we started asking the question in 1983," Crerar said, adding that journalism was trusted by 21% of the population and, the nearest category to research and analytics – pollsters – by 45%."

***Guardian* journalist Pippa Crerar**

A panel discussed applying AI in public sector research design

Considering intent and consent with AI

Researchers should consider questions of intent, consent and accountability when it comes to applying AI in research design, according to a panel session.

Sylvie Hobden, head of public attitudes at the Responsible Technology Adoption Unit, (pictured, centre) said: “AI is a partner in knowledge creation, but there is a huge role for the researcher to apply expertise and context.”

While AI “does not feel like a silver bullet”, as it cannot yet develop its own knowledge, that may change in future, said Hobden. She continued: “We may get to the point where AI can create knowledge in its own right and we may then want to draw lines. Are there certain tasks that we would want to reserve for researchers, for example?”

Lucy Farrow, associate partner at Thinks Insight & Strategy, (pictured, left) said researchers should consider the issue of intent in the context of AI. She said: “As researchers, we approach our work with intent – we have an ethical orientation. If an AI tool is interviewing a participant, how do we think about the intent that is coded into a machine system, and how does that compare with the intent of a human researcher?”

> **“People want to be able to question the outcomes of AI”**

These questions are particularly pertinent in public sector research, said Chloe Juliette, associate director at Thinks Insight & Strategy (pictured, right): “There is a real sense of the social contract with government. Research for the public sector is generally seen as trying to improve lives or policies in some way, so there’s a value placed on the respect for shared stories.”

The public needs transparency about whether AI has been used and how it has been used. Hobden said: “People want to be able to challenge and question the outcomes of AI, and to do that they need to understand a bit about how those decisions are being made.”

Additionally, researchers must outline a tangible benefit for individuals as to why AI has been used.

Hobden said: “When we speak to the public, there is an overarching sense of risk aversion. As researchers, it is important to articulate the benefit for the individual, not talking about the efficiency of the research in general. It needs to be articulated powerfully.”

ITV's Jane Stiller, left, discusses working with insight partners

Understanding marketers' evolving needs

In a discussion about what marketers need from insight, Jane Stiller, chief marketing officer at ITV, told *Impact* editor Katie McQuater what qualities she sought in an insight partner. Communication was very important, and while quality of the work was key, there were more nuanced factors at play.

"A lot of it is not only in doing good work, but in the delivery of the work," she said, adding that solid work should be a "given", "a hygiene factor".

"So, in that sense, number one: looking for a team and partners that can partner a business really effectively – that can understand their needs; number two: understand who the decision-maker is and how they are going to make a decision; and number three, be able to package the work."

And how should an agency attempt to deepen its relationship with a client?

"This is going to be a controversial opinion," Stiller warned. "Number one, just don't pester people. Be helpful... and I think that comes down to understanding the business's needs.

"If you read our results carefully, there's so much information in there. If you're a partner working with ITV, take the time – care enough to read the results, understand the context of the market we're sitting in, understand the pressures we're undoubtedly under, and then make your offering tailored and relevant to us."

> **"A lot of it is not only in doing good work, but in the delivery of the work"**

Stiller added: "Sometimes it's fine to have a transactional relationship.

"If it's one small slice of the job, you've got a supplier and they do it really well and don't bother you, and just deliver, that's a dream. If you've got a supplier that does that and then really understands the context of your business – and can demonstrate that they've got this other thing that's super valuable to meet this need that they know you have – and they deliver it in a collaborative and useful way… brilliant."

Tips from the changemakers

The most recent winner of the MRS Equality, Diversity & Inclusion (ED&I) Changemaker award, Shivonne Gates, along with finalists Katya Des-Etages, Christina Lai and Tom Richer, shared their insights on championing change, in a session chaired by Truth's Mark Thorpe.

Helen Oldfield, marketing and membership director at MRS, outlines the advice shared by the panel:

1. Share your own networks, agency or groups. You don't need buy-in from everyone, but it is important to start and keep going.
2. Ask your organisation to sign the MRS Inclusion Pledge and, if they have, ask what they are doing on the back of the pledge and to track against this.
3. Create space for individuals and share your own networks with people from marginalised backgrounds. Share knowledge and networks to make a big difference – the panel discussed groups such as Colour of Research (CoRe), for example, as a means of being connected.
4. Look for the opportunity to be inclusive, both internally at work and outside of work, such as community engagement.
5. Start walking the walk. There needs to be more listening and more connections. Listen and amplify voices.
6. Psychological safety is key – you can't create change that lasts without reflecting on this. Change needs safe organisations, including being honest on where we're getting things wrong.
7. Presume harm and look beyond your immediate stakeholders and users to broader society.
8. On the hiring side, there are easy things to implement, such as reasonable adjustments, more time, questions in advance – all things that can make a difference to hiring.

Lastly, the group called for the need to benchmark what is inclusive and what is not, and – most importantly – the need for senior people to lead on culture change.

> "There needs to be more listening and more connections"

Solving data quality issues together

Data quality in research is an increasing problem that the industry must address collectively, and determine the cost of not mitigating fraud, according to a panel.

Simon Glanville, managing director at Ronin, said the problem of data fraud is worsening. "Typically, if we're doing a broad recruitment campaign, we'll see somewhere around 20% of fraudulent activity. We believe it's getting more organised and that's something we can try to tackle collectively as an industry. It's an increasing problem and it's not going to just go away."

The problem is not confined to research. Glanville pointed out that the number of employees listed on LinkedIn as working for Apple dropped from more than half a million to fewer than 285,000 after the social network cracked down on bot accounts.

On the same panel, moderated by MRS managing director Debrah Harding, Debbie Lawrence, group head of data strategy and management at the London Stock Exchange Group, discussed how the data quality issue manifests itself in the financial sector, saying: "Having fraudulent or fake data going out into the market would be catastrophic from a reputational standpoint. It would be on the front page of the *Financial Times*."

"As an industry, you have to look at cost-benefit. What is the cost of fraud in your industry, and is it worth investing to mitigate against it?"

> **"Having fraudulent or fake data going out into the market would be catastrophic"**

On the next steps that should be taken to address data quality in research, Melanie Courtright, chief executive at the Insights Association, urged the sector to get involved in the Global Data Quality initiative, a coordinated effort between the Insights Association, MRS and other industry bodies.

"We have nine strong associations that are going to make a difference in this area, so my encouragement is to get involved in that initiative, wherever you are in the world. We're going to build a warehouse of standards and best practices.

"I would encourage you to start thinking about that now and to get involved, because we cannot solve this unless we all come together," Courtright said.

Jane Frost, CEO at the Market Research Society, addresses the conference

Read more coverage of the conference at research-live.com

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The torchbearer

Leading a call for civility in public life is Su Moore, chief executive of The Jo Cox Foundation. She meets with Jane Simms **to discuss running a legacy organisation and its work on online abuse, community and loneliness**

In June, it will be eight years since Jo Cox, Labour MP for Batley and Spen, was murdered by a far-right extremist outside Birstall library in West Yorkshire, where she was due to meet constituents. She had been a member of parliament for just over a year, but her insistence – in her powerful maiden speech – that "we have far more in common than that which divides us" remains a clarion call for unity and tolerance in British life.

Cox's parliamentary career was cut tragically short, but her energy and determination to tackle the causes of prejudice and discrimination resonated (and continue to resonate) across political divides: by 20 June 2016, just four days after she died, a fund established by her friends in her memory had raised £1m, to be distributed among causes close to her heart.

Incredibly, what was intended to be a 'spend out' organisation – it wouldn't exist in the long term – continues to enjoy a profile and wield an influence, at home and abroad, that belies its size: it numbers just 15 people. Su Moore, chief executive of The Jo Cox Foundation since January 2021, says the reason the charity punches above its weight is "one hundred per cent, without a doubt" Cox's legacy. "More than any other organisation I've worked in, including the Olympics, this is the place where I can pretty much guarantee that, if I drop an email to someone requesting a meeting or a phone call, they will say yes."

Su Moore began her career in the museums sector

Being the torchbearer for such a potent legacy organisation requires determination, diplomacy and sensitivity. The year Moore spent as director, stronger communities, at The Jo Cox Foundation, before stepping up to the chief executive role, was, she says, helpful in understanding "the sensitivities and nuances involved".

She never met Cox, but most of the trustee board members were friends and colleagues of the late MP, and Moore and her team still work closely with Cox's parents, husband and sister, Kim Leadbeater, who resigned her formal role as ambassador for the foundation when she herself became MP for Batley and Spen in 2021.

"When we embarked on our new three-year strategic cycle in 2023, one of the key things we wanted to define was what we mean by being 'a legacy organisation'," says Moore, who is acutely aware of the need to make the foundation sustainable, given that the time may come when memories of Cox fade. "We wrote down with absolute clarity that we want to make a difference on some of the issues Jo was passionate about – principally, nurturing stronger communities, championing respect in politics, and advocating for a fairer world – but also to focus on areas where we can make a difference and others can't. But we do not try to second-guess what Jo would have done or said were she alive, though we are often asked."

The foundation is best known for its work on combating loneliness, not least the annual 'Great Get Together' of community events across the UK – but it is the Jo Cox Civility Commission report, published in January of this year, that could define Moore's time at the helm.

The report, which makes 28 recommendations to improve civility in public life, couldn't be more timely. A general election is set to take place this year, and the abuse and intimidation of politicians, which the report calls 'one of the biggest threats to democracy in the UK', is a worsening problem.

Moore was closely involved in researching and writing the report, which is the culmination of nearly a year's work and involved engaging with more than 100 stakeholders, including current and former politicians, experts on representative democracy, security and justice organisations, and expert bodies, such as the Electoral

Moore is aiming to get all 28 recommendations of the Jo Cox Civility Commission report implemented

> **“I think you should do things you find interesting, and that might sometimes mean taking a step back”**

Commission. In addition to face-to-face interviews, she and her team drew on existing research, including from organisations that work closely with the public. Moore says the report, which represents views from across the political spectrum, is one of the two things of which she is most proud in her three-year tenure (the other being safeguarding the wellbeing of her staff). Asked what she would like to achieve over the next three years, she is clear: “All 28 recommendations to be implemented.”

Motivated by “finding something that is genuinely fascinating and that makes me want to get out of bed in the morning”, Moore says her current role is by far the most fulfilling of any she has had.

She arrived at The Jo Cox Foundation via a circuitous route. After a degree in war studies and history at King’s College London (her specialism was naval history), she worked at the Tate and the National Maritime Museum before becoming commercial director, and then acting festival director, at the MediaGuardian Edinburgh International Television Festival. After that, she landed a plum role as stakeholder engagement lead at the London 2012 Summer Olympics (“an incredible experience”), subsequently becoming head of development at the British Council.

Then, she was headhunted to the role of foundation director of the British Ski and Snowboard National Foundation, though she’d never skied or snowboarded in her life, taking on an additional role at GB Snowsport. “My friends, who’d been trying to persuade me to go skiing with them for years, thought it was a bit of a joke, but what attracted me to the job was the opportunity to start a charity from scratch,” she says.

Immediately before she joined The Jo Cox Foundation, Moore took a six-month sabbatical, hiking and climbing in the Pyrenees and improving her French.

Moore with King Charles at a Meta event

© Clarence House

“We find time and time again that people really relish the opportunity to get together with people who are not like them... it deepens their sense of community”

“I think you should do things you find interesting, and that might sometimes mean taking a step back,” she says. “I’ve never been focused on trying to climb the career ladder.”

Clarion call

Cox is not the only politician to have lost their life in the course of their duties: Conservative MP Sir David Amess was killed while holding a surgery in his Southend constituency in 2021. The Civility Commission report highlights the prevalence and severity of the attacks on, and threats to, national and local politicians, their families and their property. Abuse ranges from stalking and slander, to rape and death threats, and arson – and is a major reason many MPs say they plan to stand down at the next election.

“The abuse is getting worse,” observes Moore. “Social media is a conduit: people can send abuse to their elected representatives, they can egg each other on, find and spread misinformation and disinformation, and you get a ‘pile on’ effect.”

The Jo Cox Civility Commission is calling on Ofcom to specifically consider the experiences of elected politicians as part of its regulatory duties, and for all social media companies to extend the kind of support already provided by some, including Meta, to national and local politicians – by, for example, making it easier to report and take down misinformation and disinformation.

However, perhaps a bigger factor than social media, suggests Moore, is the impact of the past decade in UK politics, characterised by some of the big ‘yes/no’ issues, such as the Scottish independence and EU referendums, which have pushed people to take sides. “And issues around Covid, including ‘partygate’, have eroded trust,” she adds. “It’s a perfect storm.”

Polling by the Electoral Commission after the May 2023 local elections found that, while three per cent of those aged 45 and over thought abusive behaviour was acceptable, this increased to 16% in the 18-24 age group. It is “one of the most shocking pieces of research” that Moore encountered during her research for the report. Young people are losing hope and belief that they can change anything, influenced partly by their inability to vote in the Brexit referendum, and partly by the impact of Covid lockdowns and the current cost-of-living crisis, she says. “Their belief that ‘all politicians are as bad as each other’ will be a challenge when it comes to turnout at the general election.”

To address this cynicism, one of the report’s recommendations is to improve political literacy – including through regular visits by councillors and parliamentarians to schools and colleges to raise awareness of what they do, and by running public education campaigns alongside elections to help inform people about who and what they are voting for. The report also calls on all elected representatives, especially those in leadership roles, to model good behaviour by treating each other with respect.

Its primary recommendation, however, is that the government establish a central unit to address the problem of intimidation and abuse of elected politicians and appoint a minister to run it. It may seem surprising that such a coordinating body does not already exist, but, says Moore, given the number of major issues politicians are wrestling with – from the Israel-Gaza war to the cost-of-living crisis – "they feel that devoting time to asking for something that will help them in their own day-to-day lives would not sit well with the electorate."

Understanding community

As an independent organisation, The Jo Cox Foundation believes it can and should step into this space. "There is precedent," points out Moore. The fact that the UK has a 'minister for loneliness' – the current incumbent is Stuart Andrew, parliamentary under-secretary of state for equalities – is the direct result of a recommendation from the final 2017 report published by the Jo Cox Commission on Loneliness, set up by the late MP shortly before her death in 2016.

Loneliness remains a focus for the organisation – around 250 community events took place across the UK during the 'Great Winter Get Together' in January. It gets intelligence from the communities it works with and from the Connection Coalition, which it runs – a group of more than 1,000 organisations working, mostly, at a small, local level.

Research conducted by the foundation in 2022 found, perhaps counterintuitively, that the loneliest cohort is 18-24-year-olds, says Moore, whereas the least lonely are those over 70. Social media again plays a role: it provides the illusion of connectedness, but is a poor proxy for meaningful connection, she points out.

As part of its commitment to stronger communities and a fairer world, the foundation ran a project with refugee and migrant communities in Yorkshire in 2023. Moore won't be drawn on whether or not people really want to 'stop the boats', as the government insists they do, but says: "We find time and time again that people really relish the opportunity to get together with people who are not like them: they often strike up genuine friendships and it deepens their sense of community."

Community itself is a multifaceted concept, she points out, and is the subject of "ongoing conversation" at the foundation, where deepening the impact of the work it already does is another strategic focus. "'Community' can mean the local neighbourhood; it can mean people with shared interests who don't live near each other; it can mean shared identity; and it can mean place," she explains. "However you define it, we know that being part of a community, where people accept you for who you are, is really important for general wellbeing."

Should more public policy-making be informed by the kind of research The Jo Cox Foundation does – and are those who are making policy sufficiently in touch with the ordinary lives of the people their policies will affect?

"A lot of good research does exist, but the way it is accessed by government could improve," says Moore. Part of the problem is the level of ministerial churn: "We have good relationships with ministers and civil servants, and we can be a conduit between policy-makers and organisations on the ground. I genuinely believe there is goodwill there, but it can take a long time for a new minister to get their head around a specific brief."

The nature of the research Moore and her colleagues conduct, particularly for the Civility Commission report, can take an emotional toll. "There have been times while doing the abuse and intimidation work when I have just needed to step away, because it becomes very intense," she admits. Moore adds that, although it is "an organisation born from trauma", the foundation is very well aware of the effect some of the work it is dealing with can affect everyone, not just her.

"Making sure that staff wellbeing is at the centre of everything we do has been a really big development for us, organisationally. People always know that, if things get a bit much – or if they need someone to talk to – we have internal support systems in place to help. And everyone knows they can come and talk to me about anything."

One way Moore herself decompresses is by running – a hobby that delivers additional benefits. "I get my best ideas at 7.30 in the morning when I'm pounding the pavements."

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Moore joins in with a Great Get Together event in London

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Mastering *the* wave

The influence of artificial intelligence is rising. Katie Jacobs **reports on the interplay of researchers and technology, and how practitioners can avoid the drift and become masters of the new insights paradigm**

> “There’s been a mantra for the past 10 years about using technology to be faster, cheaper, better – but mostly it’s been faster and cheaper, sometimes with detriment to quality”

For Clare Michelmore, UK insights lead at FMCG giant Kimberly-Clark, it all started when someone showed her how ChatGPT could be used to write silly poems. Since then, she’s gone from limericks to complex research applications, using generative artificial intelligence (AI) tools to transform the way she works – and she’s excited about the future potential of such technology.

“Insights is one of the best industries [for these tools] because there are so many good, interesting applications,” she enthuses, name-checking techniques such as eye tracking (for which AI has a close correlation with humans, she notes), qualitative probing (where generative AI follows up on open-ended questions with research participants, generating in-depth answers) and assistance with question writing (taking away some of the mental load) as particularly useful in her experimentation journey so far.

As Michelmore’s story demonstrates, generative AI is already having a profound impact on how many insight professionals are working. The sector is ripe for disruption, with the potential of these tools to speed up data analysis, automate insights generation, produce compelling data visualisations, and even recommend campaigns based on its insights. No profession or industry is immune, however. According to a report from Bloomberg Intelligence, the generative AI sector could grow to $1.3tn over the next 10 years, from a market size of $40bn in 2022. ‘AI’, the abbreviation of artificial intelligence, was named the 2023 word of the year by Collins English Dictionary, while Cambridge Dictionary chose ‘hallucinate’ and updated its definition to include AI programs providing (or, rather, making up) misleading or incorrect information.

In the research sector, much discussion has centred on the potential of these tools to transform the work itself. Less has been said about the skills required to future-proof the industry and the people working within it at a time of growing reliance on technology. With the possibilities that technology offers advancing at an intense, almost breathless, rate, how can researchers ensure that the future is one of humans and machines working in tandem, rather than machines going it alone?

First, though, it’s worth re-establishing what generative AI does well – infinitely faster, if not better, than humans – and how researchers can benefit. Ben Davis, head of data, AI and research tech at Opinium, explains that AI can help tackle complex research problems, such as how to extract meaningful insights from large volumes of unstructured data, at speed and scale.

“Insights workers will be empowered to perform technically complex tasks, such as advanced statistical analysis and iterative design of open-text code frames,” he says. Research from Harvard Business School and Boston Consulting Group in 2023 found that consultants using AI produced 40% higher quality results, and completed tasks 25% faster, compared with a control group. “AI tools not only help us automate tasks and complete work faster,” adds Davis, “but they also help us deliver higher-quality study design and research analysis to our stakeholders and clients.”

Phil Sutcliffe, managing partner at Nexxt Intelligence, describes the technology as having game-changing potential compared with tools that have come before. “There’s been a mantra for the past 10 years about using technology to be faster, cheaper, better – but mostly it’s been faster and cheaper, sometimes with detriment to quality,” he says. “But generative AI allows us to understand people better at scale.” This, he adds, frees up researchers to focus on more impactful – some would say rewarding – work, such as designing research and analysing and communicating it in a way that adds value and leads to better business decisions.

“This disruption is fundamentally a good thing for the research business, because it forces us to connect with what we are great at,” agrees Zoe Fenn, leadership consultant and founder of You Burn Bright. “Those strengths might have been underused for a long time – we used to spend so much time churning through data to get to what we love to do. This shift will allow those brilliant minds to get back to what they are great at, but haven't had much time to put their energies into."

The benefits of researchers engaging with this technology is clear, and the research sector is well placed to take a lead on embracing new tools. Betsy Fitzgibbons, shopper insights lead, e-commerce and new transactions at Mars Wrigley, believes the insights function is the one "best suited to pilot, test, kick the tyres and embrace AI technology for the good of the business, identifying where it can add strength, power and effectiveness". But, she adds, it is incumbent on insights teams to "recognise and call out AI's limitations and pitfalls, as well as build guidelines". (More on that later.)

So, what are the specific 'technical' skills insights professionals need to engage meaningfully with this technology? After all, despite their impact and speed of development, many of these tools are in their infancy.

According to a 2023 survey by Microsoft, industry leaders believe it is essential that employees from all professions and sectors learn when to leverage AI, and how to write great prompts, evaluate creative work and check for bias. Fitzgibbons flags data analytics as an essential skill for insights professionals and one that won't be disappearing, even as machine capability increases. Opinium's Davis highlights a culture of continuous learning, with an emphasis on data and digital literacy.

> "Not everyone is going to need to be expert in how AI works; you are going to need to be expert in how you can use it to your advantage"

As Microsoft's survey found, prompt engineering – the process of structuring text instructions so they can be understood and interpreted effectively by a generative AI model – is increasingly important. "To be most useful, generative AI needs clear objectives and context," explains Harley McKee, business intelligence manager at Opinium. "Better outputs and ideas come from better reasoning and thoughtful instructions. Similar to how the best managers inspire great work by defining roles, removing ambiguity and setting clear goals, researchers must communicate with large language models (LLMs) as if they were a person to whom you were delegating important work." When it comes to learning how to do this effectively, he recommends "getting your hands dirty", jumping in and experimenting with the technology.

This is something Michelmore has experienced. "The first time I briefed a bot to do an end-to-end piece of research, I realised it hadn't understood my brief when I got the research back," she recalls. "If I'd been briefing a human, they would have asked questions. But my business questions remained open – which was fine, as it was a pilot, so I was in a safe space to learn. It was a great tool; what messed it up was my inexperience."

Michelmore advocates piloting and creating safe spaces to learn and fail. A portion of her budget is ring-fenced for doing just that, and the team has quarterly development days to focus on learning new skills. "The most important factor is the willingness to try something new," she says. Curiosity about the possibilities of new tools and an appetite for experimentation – with the necessary guardrails in place – is a critical mindset for researchers to adopt.

Steering the ship

For those who are less technically minded, Sutcliffe has a reassuring message. He believes insights professionals, on the whole, do not need to understand what is inside the 'black box': it's about knowing how to leverage the technology and mitigate risks. "AI will increasingly become about buying applications," he says. "Not everyone is going to need to be an expert in how AI works; you are going to need to be expert in how you can use it to your advantage."

While there is a benefit to understanding prompt engineering, Sutcliffe doesn't think it is essential for all researchers, given that solutions will increasingly have the AI built in. "The job of a researcher is how to address the client problem, find the insight and communicate that effectively," he explains.

In other words, it is more important to know how to leverage some of those uniquely human (for now, anyway) skills. For Sutcliffe, the most essential are what he calls the 'four Cs': connection, critical thinking, creativity and communication. Connection is about empathy – the ability to connect with people on a human level, something machines cannot yet achieve. Insights professionals need to "add a human layer to data to bring it to life", says Fitzgibbons, "as well as be the human conduit to maintain that empathy component that is necessary… to connect with consumers". They must also be "the voice and champion of the different voices of the consumers, [ensuring] businesses don't just go after numbers", she adds.

Critical thinking is perhaps the most essential skill when it comes to mitigating risks associated with AI. Assuming tools are infallible is not just ill-advised – it's dangerous. There are plenty of examples of generative AI 'hallucinating' inaccurate or misleading information that could be damaging to consumers and organisations. It frequently hallucinates false legal information, for instance, and AI-generated imagery has been found to be biased, amplifying gender, racial and other stereotypes.

Insights professionals must be aware of such risks and ensure that a human is always in the loop to watch out for errors and inappropriate suggestions. "Automation does not relieve us from validation," says Nick Rich, until recently vice-president, insights and analytics at Carlsberg Group. "We have an obligation to ensure [AI-generated outputs] represent a true perspective of consumer behaviours, needs and desires."

The issue to recognise, says Shari Aaron, executive vice-president of growth and innovation at Radius, which has worked with Mars Wrigley on AI-based projects, is that we cannot keep tabs on the millions, even billions, of data points from which AI is drawing. "Given the scope and large-scale abilities of the LLMs to take in data, we have to be uber-cautious about the validity of the information included before we trust the outputs from these models," she warns. "There is no way to know the accuracy... LLMs are so opaque." Anderson offers a note of caution around inputting proprietary or

The client picture: promoting adaptability and learning agility

Nick Rich, a global insights leader who has held roles at Carlsberg Group and IHG, is the author of a forthcoming MRS paper on the skills required in a modern client-side insights team. *Impact* spoke to him about what AI means for skills...

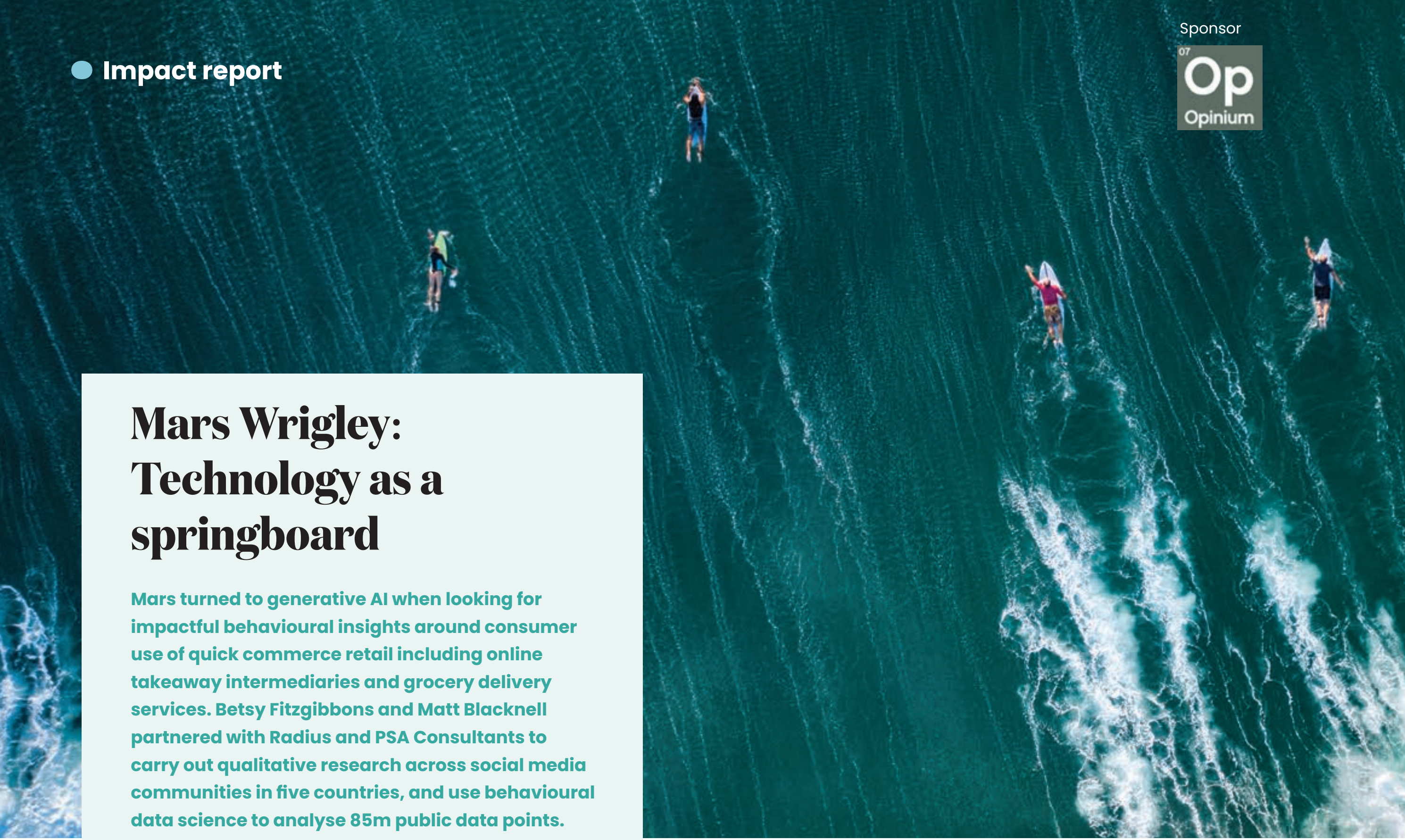
"Insights leaders should recognise the transformative potential of these tools and embrace the benefits. That means fostering a culture of learning and adoption within teams, investing in upskilling and continuous learning, encouraging people to explore training and certifications, and promoting creative experimentation within a supportive environment.

When it comes to recruitment, leaders should prioritise data science skills, including programming and machine learning. Be sure to encourage collaboration between data scientists and insights professionals, to foster mutual learning. But exercise caution before rushing to recruit 'prompt engineers' – instead, use AI to empower insights teams to augment their capabilities.

Beyond technical skills, we need to emphasise cognitive abilities, such as critical thinking and problem-solving skills. In recruitment, set problem-solving challenges and observe how candidates use the tools available, including AI.

We should promote adaptability and learning agility: a willingness to learn and stay up to date with emerging technologies. Leaders should foster a growth mindset in teams, encouraging them to embrace change as an opportunity for growth. Change is happening so fast, you want people who will go with it and learn as they go.

While AI will bring transformation, complete redundancy is unlikely. It's just a tool, not a replacement for human expertise. We need to learn to handle it well, using it to enhance our capabilities rather than fearing obsolescence."



Mars Wrigley: Technology as a springboard

Mars turned to generative AI when looking for impactful behavioural insights around consumer use of quick commerce retail including online takeaway intermediaries and grocery delivery services. Betsy Fitzgibbons and Matt Blacknell partnered with Radius and PSA Consultants to carry out qualitative research across social media communities in five countries, and use behavioural data science to analyse 85m public data points. Mars used AI to generate ideas and imagery as a springboard for future marketing activity.

The project led to improved sales and targeted promotions, and it's given those involved a greater understanding of the power and drawbacks of AI.

"The speed with which you can generate thought-provoking and inspiring images, taglines and concepts, crafted from research results, to ideate with teams in workshops is amazing," says Fitzgibbons. "The watchout is [these concepts] are not fit to be launched as is – for now. That will change as generative AI improves."

This means the insights team needs to be central to building guidelines around AI use, and ensuring human elements, such as empathy, remain front of mind. "I heard someone say that 'AI is like having a million interns'," Fitzgibbons adds. "It is great to churn through reams of data, but you must check it. You need the research basics under your belt so you can identify when the AI outputs seem off kilter."

Core to developing AI skills are a willingness to try new things and a psychologically safe environment. "Build a culture where failures are not 'death to your career' but rather a way to learn," advises Fitzgibbons. "When piloting anything new, build in a post-mortem period to evaluate what worked and what didn't."

Shari Aaron and Shayna Beckwith, of Radius, class "higher-level thinking, critical thinking and the ability to analyse data across a variety of sources to extract the most meaningful and impactful information" as skills that remain uniquely human – as is the ability to apply good judgement in a world where misinformation can be rife.

sensitive information into open-access tools such as Bard or ChatGPT: "Security of confidential information is our first priority."

McKee agrees on the need for caution, advising: "Researchers must be careful not to 'fall asleep at the wheel', letting the AIs do everything for them or copying outputs without critically reviewing them. We need to grow as strategic thinkers. While AI tools can help us run our metaphorical ships, we always want to make sure we're the ones who make the final decision about where to steer."

While generative AI can produce 'creative' work (see image generators such as DALL-E), true creativity remains in the realm of things humans can do better. The consensus is that using AI frees up more time and brainpower for humans to focus on creative and strategic tasks. But that doesn't mean AI can't provide a useful starting point for creativity, whether by analysing reams of insight to suggest concept angles and taglines, or suggesting survey questions that a tired and overworked researcher may have missed.

"Generative AI tools help jumpstart creativity and offer a sounding board for our insights consultants to sharpen their research reasoning, which, they say, makes tackling the most complex research challenges feel more manageable – and seriously fun, too," says James Endersby, chief executive at Opinium and chair of MRS.

Once you have developed ideas and analysis, communication remains, for many, the final hurdle. As Sutcliffe says: "Having insight is one thing, but

"AI is like swimming; I can swim faster with flippers, but the flippers can't swim without me. I don't think you can take humans out of it anytime soon"

persuading organisations to take action on those insights is another: it requires great storytelling and communication skills." These are not a given, and communication is an area in which many commentators feel insights professionals must up their game.

"We still have a long way to go to develop those skills," says Fenn, about the importance of communicating effectively with colleagues, stakeholders and clients. "We've been working in silos. You don't come to an insight on your own."

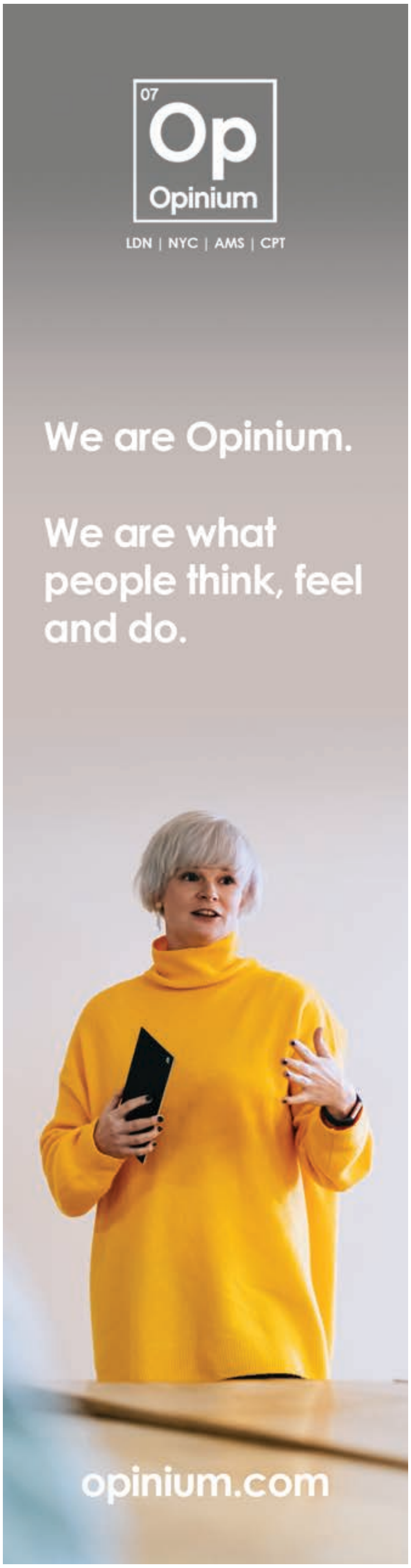
That enhances the importance of what Fenn refers to as social capital: the connections between people. To briefly skirt another hot debate, the increasing use of AI could mean there is more value in spending time together in a workspace, especially for early-career professionals who benefit from mentoring (formal or informal) and observing and collaborating with more experienced colleagues.

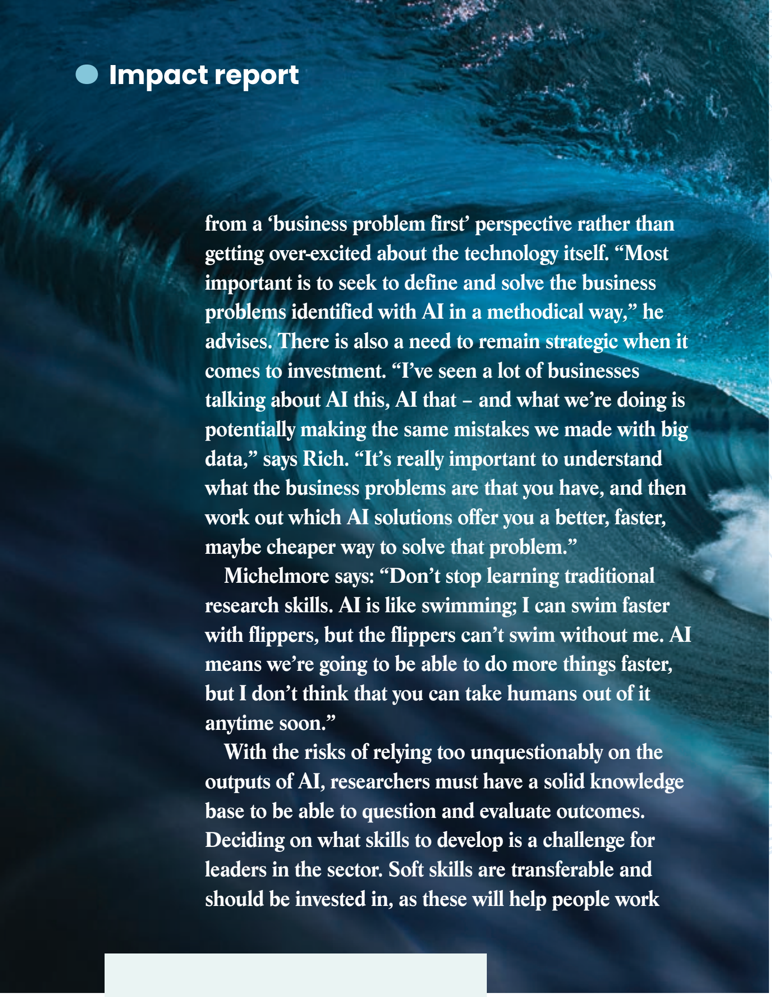
Remembering strong foundations

Communication, creativity, empathy, critical thinking… these are all transferable essential skills. They are sometimes described as soft skills (rather unfairly, as many leaders know they can be some of the hardest to demonstrate), but they are the skills a machine will find most challenging to replicate. It would still be a mistake, however, for insights professionals and employers to neglect the foundation of market research.

When musing on in-demand skills, Sinead Hasson, chief executive at specialist recruitment agency Hasson Associates, points out that companies will always need classic research skills. "The ability to be a great qualitative or quantitative researcher will always be valuable," she says, noting as equally useful those skills around open source and social media data analysis, people, communication and leadership, and business nous.

Rich also highlights business acumen, pointing out that client-side leaders in particular need to approach AI





from a 'business problem first' perspective rather than getting over-excited about the technology itself. "Most important is to seek to define and solve the business problems identified with AI in a methodical way," he advises. There is also a need to remain strategic when it comes to investment. "I've seen a lot of businesses talking about AI this, AI that – and what we're doing is potentially making the same mistakes we made with big data," says Rich. "It's really important to understand what the business problems are that you have, and then work out which AI solutions offer you a better, faster, maybe cheaper way to solve that problem."

Michelmore says: "Don't stop learning traditional research skills. AI is like swimming; I can swim faster with flippers, but the flippers can't swim without me. AI means we're going to be able to do more things faster, but I don't think that you can take humans out of it anytime soon."

With the risks of relying too unquestionably on the outputs of AI, researchers must have a solid knowledge base to be able to question and evaluate outcomes. Deciding on what skills to develop is a challenge for leaders in the sector. Soft skills are transferable and should be invested in, as these will help people work cross-functionally and are not going to be replaced by machines. However, people with those skills might not have gone into market research traditionally, instead choosing marketing or consultancy-type roles. As Sutcliffe points out: "The sector is going to have to be more focused on recruiting intelligent, capable, curious people and helping them develop those skills."

A final rule to live by when it comes to working in tandem with machines, says Preriit Souda, of PSA Consultants, (see boxout, page 30), is not to try to compete with the machine. "Machines come and go; it's the ability to think that matters," he says. "Use these tools to enhance your ability, not compete with what they do faster and better."

A 2023 IBM report found that leaders expect 40% of their workforce will have to retrain or reskill in this new world, and included a powerful quote: "AI will not replace people… But people who use AI will replace people who don't." Asked for his advice to researchers looking to future-proof their careers, McKee says: "Be curious and never stop learning."

It's not about letting technology take over, but considering how you can use it to do your job better. Don't fear the machines, but don't trust them implicitly and uncritically either. Future-proofing is about making sure you are one of the people who is aware of and curious about how to work in partnership with them.

You've got this!

Many in our industry are feeling a little overwhelmed by the tidal wave of opportunities, benefits and complexities that generative AI presents. Many wonder how their roles might change, or if they will even disappear. Most are asking what skills they need to develop to not just stay relevant, but also to thrive.

Generative AI is an invaluable resource and delivers efficiencies in data discovery, ideation, content creation, and technical programming. This, in turn, allows us to operate at speed and scale, freeing up consultants, for instance, to spend more time on creative solutions to client challenges.

But what if you're in a client-side team or, like my team at Opinium, you're at a mid-sized people-focused insight consultancy and now suddenly need to know how to get the most out of this incredible new ResTech? What skills do (human) researchers need to work on to make the most of these benefits?

The good news is that we have many of these skills already. High on the list must be our communication skills and a willingness to experiment.

You (usually) wouldn't expect a team member to read your mind about strategic project priorities or deliverables formatting. These technologies can make assumptions and infer what you want, but the best results come from spending the extra effort to clearly define your problem and outline the specific steps or formatting you want back.

No training or webinars can fully substitute for experimenting with these tools to understand where they excel and what types of tasks you need to steer away from or bring more scepticism to the outputs. Remember, machines will never be able to replace collaboration, empathy and a deep understanding of research (and human) needs. See, you've got this.

Client-side researchers, their stakeholders, and agency insight consultants will still need to communicate with each other, to deeply understand what we all want to achieve through the research, why it matters, and how best we can use it to drive forward.

Humans are still best at understanding cultural nuances, which can affect how we write a specific survey question, or inform how we approach a sensitive research topic in an interview, for example.

Businesses must foster a culture of continuous learning to drive efficiency, creativity and innovation.

Data-driven storytelling skills, cross-disciplinary collaboration and effective communication need to be at the core. You've got this!

James Endersby,
chief executive, Opinium

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Thinking for yourself

Research is the backbone of The Economist's **subscription strategy. From launching a paywalled podcast to integrating user experience research, Seema Hope tells** Katie McQuater **how insight is fuelling the free-thinking media brand**

For fact's sake.
Popeyes
WINGS
I NY. GIFTS I NY.

In the battle for attention, often what it takes to stand out is something simple. Amid the hustle and bustle of New York City, a digital billboard with a red background playfully asks the reader to 'Paint the town read'. Perhaps looking to raise the brow of a discerning news consumer, another reads 'For fact's sake'.

The adverts are part of *The Economist*'s push to expand its readership in the United States and bring the current affairs magazine to life with an American audience. The campaign also hints at its tagline: 'Independent journalism for independent thinking'.

When I catch up with Seema Hope, global head of consumer research at *The Economist*, at the publisher's London headquarters, she talks about the challenge of capturing that independent mindset from the perspective of attracting new subscribers. "Having curiosity and independent thinking is what attracts people to the brand," she says.

"We know that we make a difference in people's careers and their conversations – but it's really difficult to get that across in a marketing message.

"Yes, we appeal to a certain demographic, but it is also the mindset, which is really hard to find from a marketing perspective."

When our interview takes place, Hope is one year into the job and has been focusing her efforts on how research can inform and help fulfil the publisher's ambitions, in what is undoubtedly a crowded media landscape.

As home to around half of *The Economist*'s subscribers, America is a big part of that ambition. "The US is our biggest market; it's where we see the biggest growth in the short term," says Hope.

Of the US campaign, Nada Arnot, executive vice-president of marketing at *The Economist*, says: "Research has been a critical thread throughout the entire campaign – from audience research and value proposition validation to creative testing and measurement of impact with brand lift studies and brand trackers."

The Economist
Independent journalism for independent thinking
I ❤ NY GIFTS I ❤ NY
RECHARGE STATION
WiNGS in 5 new flavors

The Economist's brand campaign, which it worked on with branding agency Loyalkaspar

WICKED
CELEBRATING 20 YEARS ON BROADWAY
ST. JAMES
If all the world's a stage, get a backstage pass.
2NDSTAGE

It's not just the US, though. "We have ambitions to grow everywhere – it's the top strategy," says Hope. "It's a simple message we can all get behind: growth. Everybody is working towards that."

Hope heads up consumer research, looking after the brand and working mainly with the marketing team. Her team has been established to be the voice of the consumers who come to *The Economist* via subscriptions.

Sitting within the data division, the consumer research team consists of five employees, including one researcher in the US, which Hope says is useful for keeping the team from being too UK-centric. "We need to make sure we don't just have a UK lens – even for things like language if working on a global survey. Head office is in the UK, but our consumers are all over the world, so we can't just think in pounds and what the UK consumer thinks."

The team analyses all aspects of the subscription process, from people joining at the top of the funnel to those cancelling their service. User experience (UX) research is also part of the team. Of the setup, she says: "UX, market research and data can be in siloes, and one doesn't know what the other one is up to – but what I love about what we've got here is that it's all in one division."

Listening closely

To paywall, or not to paywall? That is the question on the mind of many publishers, but not for *The Economist*. With the principle of never giving its journalism away freely, *The Economist* publishes the majority of its content behind a paywall and has 1.158 million subscribers globally.

In 2023, the publisher went a step further and launched a paid subscription model for audio, Podcasts+, making most of its podcasts – including weekly shows on global affairs and series such as *Boss Class*, a podcast on management – only accessible behind a paywall.

"It's a simple message we can all get behind: growth. Everybody is working towards that"

Research heavily informed the launch of the paywall because podcast data is infamously sketchy. While *The Economist* knew it wanted to rethink its podcast model, it needed to understand the experience that users would have, and what copy would resonate with them in communicating the new subscription offer.

It also had to establish the basics, such as pricing strategy. With scant other paywalled podcasts from which to learn, and a complex podcast platform ecosystem, research was essential in getting the new proposition off the ground.

"It involved a huge research programme," says Hope, of the work that began shortly after she joined the organisation. "It's really hard to have a full understanding of our podcast universe because of the platforms involved, and there isn't a single point of measurement – nothing consistent – so we were already up against a few challenges.

"But we feel really strongly about the content being so strong. Everything else we do, we put a value on. It was time to start thinking about our podcasts… they are expensive to produce."

The business needed to learn a lot in a short period of time – the research began in January 2023, with the podcast subscription launching in October. The work involved qual, quant and UX research, as well as analysing behavioural data around how people consume the podcasts.

With audio being a literal voice in the listener's ear, it's quite an intimate

"We had to learn very quickly about how to market our own brand within podcasts and how to talk about it"

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Every weekday our global network of correspondents makes sense of the stories beneath the headlines. We bring you surpris

medium, so the research examined the feelings people had about the experience. "It's a personal relationship with our hosts, and that's something you don't necessarily get through other media," says Hope.

The research also discovered how a listener's attention dips in and out when a host changes tone, or when marketing messages kick in. Hope explains: "Industry has done so much in terms of how the brain processes digital marketing and advertising, but we had to learn very quickly about how to market our own brand within podcasts and how to talk about it, so research was involved in all of those aspects."

Early ideas about how *The Economist* would paywall were translated into very early prototypes trialled with consumers. The research team then fed back to others in the business about what made sense and what didn't, and made recommendations. One of the observations Hope's team made, for example, was that it is very difficult to explain the mechanics of a paywall through audio.

"We wanted to get across a new concept to listeners, but we discovered that you have to be really succinct with sentences, because the brain zones out as soon as consumers start thinking 'this is a marketing message'. So, we had to think carefully about what information we should talk to people about."

This included using the 'show notes' that accompany a podcast episode, which the team discovered was a useful mechanism for communication.

"If you're sending out an email, you can explain why you're doing it and people can choose to read it or not, but at least it's there," says Hope. "With audio, it felt like we needed to change the way we talk about what we're about to do."

The research involved testing a message with consumers that was focused on the value of *The Economist*'s journalism and supporting it. But even before that was put to participants, they "spontaneously" mentioned understanding the need to put a value on content, says Hope. "Once that was fed back to editorial, they were able to tweak the message. It doesn't mean everyone's going to pay for it, but we were able to get the right tone across."

As well as tone, insight work helped to inform pricing strategy and direction for the publisher's internal specialists, in the absence of anchors in the rest of the market.

UX research also played a big role, because podcast listeners access their content via multiple streaming platforms, such as Spotify, and there was work to be done to explain how subscribers should link their account. "We knew we were putting something in front of consumers that wasn't necessarily going to be easy," says Hope. "In the end, most people were able to link their account quite easily, but research helped to know what information was needed to hold people's hands through the process."

The other outcome of the podcast work was that everyone in Hope's team was involved in it, and it helped to establish the research team in a new way of working – one that is focused on partnerships.

Lateral thinking

From an insight perspective, 2023 was a year of setting up a lot of new initiatives, laying the groundwork and "getting the basics right", according to Hope. This included the launch of a new brand tracker and partnering with a panel provider – Fuel Cycle – to launch its own panel for the first time, for example. Now, the focus is on "accelerating and making it actionable".

Another of Hope's priorities is to work in a way that is 'horizontal' across the business. "It's a real focus that everyone in the team needs to have conversations horizontally. We're not just researchers working in a silo on a project; it has to be connected to other things," she says.

What that may look like, for example, is one of the UX researchers being embedded into the product design life-cycle, depending on what product designers are working on that quarter. Similarly, one of the members of Hope's team is dedicated to retention marketing research and understanding the full journey subscribers take, working hand in hand with the retention marketing team.

This approach is a relatively new way of working for the business, but one that Hope thinks is paying off so far, and it allows the team to identify trends or insights that may resonate elsewhere. "Being a small team is great, because we all know what everyone is working on. We meet every day and everything is updated on Slack. We can say 'that's interesting that you've said that video's important in acquisitions marketing – I'm also working on video on UX'. We don't just have one report that goes out."

Hope, who spent 15 years at Dennis before *The Economist*, is an advocate of spending time away from your desk, learning about the subject area in which you are working – and having self-determination as a researcher.

"We're not just researchers working in a silo on a project; it has to be connected to other things"

"Being a client-side researcher now, you have to be a jack of all trades. You have to be commercial as well [as having research experience]. For example, I'll organise some training courses – forget you are a researcher for the day; this is everything you need to understand about subscription marketing. And then start thinking about where the research comes in – you can then apply research to ideas that make sense to your stakeholders internally and speak the same language.

"We can't rely on marketing coming to us and saying 'this is what we want to find out' – we have to be in their world, as well as being good with data. We have dashboards coming out of our ears, but if you don't understand what the data is saying, or what impact that has, it's going to be difficult to be a researcher and say 'these are the things I can help you [with, to]understand why the data is showing this'."

Are there times when UX research challenges a market research finding? "Yes, I'd expect it to," says Hope. "People might tell us through a survey that something is important to them, but UX will show it in a different light."

Video is one example of this – survey and behavioural data might indicate that video engagement is high, but readers might report, via the panel, that it doesn't interest them, as they prefer other formats.

"Data shows us video is growing and engagement is really strong, but – there is a 'but', which is where the research comes in, and that is that there is no single finding: it is more nuanced. That's where the UX comes in – to identify where someone might have wanted to click, but didn't, or they did and it didn't quite match their expectations, for example."

The team is also doing UX work with some of the brand's younger audiences, looking at where they consume its video – how they watch it on the go is "very, very different", says Hope.

These approaches help the team's conversations to be multidisciplined and encourage challenge, says Hope. "It's absolutely encouraged."

Another priority is branching out in terms of who it speaks to for its research. *The Economist* has a "very engaged audience" – "we will ask them questions, they'll tell us what they think and they don't hold back" – but Hope is looking at how tech can help reach new audiences for research. Using WhatsApp, for instance, and integrating that with survey data, as well as revisiting qual. This could be students, for example, who might find the tone of a researcher too professional.

Hope says: "We need to be more innovative about how we talk to different audiences that aren't necessarily receptive to wanting to tell us what they think. We can't assume our panellists are the voice of everyone."

National Theatre
← TERRACE RE

Treading the boards

Since its formation in the 1960s, the National Theatre has become a national treasure, and now the organisation is acting on insight to shape its future. By Liam Kay-McClean

What comes to mind when you think of British theatre? Do you think of *Amadeus*' fictional rivalry between Mozart and Salieri, or the *History Boys*' school drama set in a Sheffield grammar? How about the creation of *Frankenstein*'s monster, the farce of *One Man, Two Guvnors* or Shakespearean classics such as *Othello* and *Hamlet*? All those plays have either debuted or starred at the National Theatre (NT).

With its current base on London's South Bank, the NT came into life 61 years ago, inaugurated by Sir Laurence Olivier, its director for the first decade. In the years since, the NT has gained a strong reputation for its artistic output, which survives into the modern day. However, there has long been tension between artistic fulfilment and commercial sensibilities, as with any artistic organisation.

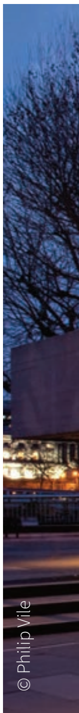
Nicholas Hytner, director of the NT between 2003 and 2015, wrote in his book *Balancing Acts* about the challenge of navigating those two seemingly polar opposites: art and business: "You start with a vision and you deliver a compromise. You want a play to be challenging, ambitious, nuanced and complicated. You also want it to sell tickets."

On a surface level, it might seem that research would have trouble straddling that seemingly insurmountable divide between generating money and developing theatre. However, that is simply not the case. "Broadly and historically, the NT is an incredibly data-rich organisation, to a point where lots of ears are open for how best to shape the future of the organisation, knowing that data and insights form a core part of that [future] – it's an incredibly receptive place," says head of data and insight Alex Wheatley.

The first act

Wheatley joined the NT in 2021, having previously worked at Kantar. The pandemic underlined how important insight was to the organisation; the insight function tracked how customers' opinions and behaviours changed around returning to the theatre post-lockdown, and more general shifts in attitudes to socialising throughout the pandemic and later on.

The pandemic also led to growth in other forms of theatre consumption. National Theatre at Home, the NT's streaming service, finished the 2021/22 financial year with 52 titles available and 358,587 hours of theatre watched



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by audiences worldwide. The NT launched the platform on 1 December 2020 after it spotted significantly increased demand for recorded theatre performances on its media channels during the first UK Covid-19 lockdown.

The trend towards digital consumption of the arts has remained significant, with UK government figures showing 'digital arts' accounted for 28% of total arts engagement in 2022/23, a 1% increase from the previous year. This is coupled with a broader return to the theatre, with NT South Bank in-person audiences rising above 2019 figures in 2022. "There is a plethora of new insights available on our audience and our engagement, and a whole new digital platform to explore and build reach," says Wheatley.

It's not just online either – the NT also broadcasts its plays in cinemas and on television. For example, its 2020 production of *Romeo & Juliet* ran on Sky Arts and PBS in the US, with a combined audience of 900,000, as well as screening in almost 300 cinemas across the UK.

Wheatley balances several different data sources in his research, including analytics from the NT's own ticketing platform and regular surveys with South Bank attendees to get feedback on performances. The NT has its own ticketing platform with analytics, as well as regular surveys with South Bank attendees to get feedback on performances. Each method of distributing NT content – film, talks, education in schools and universities, streaming and the South Bank stages – feed into the data team's work.

"We have lots of disparate data sources, so I have to get my hands very dirty in terms of thinking how to connect those sources, and how to build a holistic picture and single view of quite complicated interactions," Wheatley explains.

The organisation also regularly commissions research to look at people who do not engage with the NT. "There's a risk that when we have such a vocal, engaged audience, we put too much emphasis on those loud voices and don't provide the space to do the research with the people who aren't interacting with us, and where those gaps are," Wheatley adds. This has been particularly important as a worldwide pandemic that curtailed social interaction morphed into a cost-of-living crisis.

> **"There's a risk that with such a vocal audience, we put too much emphasis on those voices and don't provide space for research with others"**

Wheatley joined the NT in the height of the pandemic and said "from an insight perspective, it was like being thrown in the deep end". Data has been used to shape the organisation's response to crises, such as the decision to launch its home-streaming platform. "There's lots of information," Wheatley adds. "It's about taking a deep breath, stepping back, going back to the basics of insight and remembering that everything is means-to-an-end to explain and understand things.

"If you ask the question 'why hasn't someone booked tickets to this show?', it's not as simple as whether they liked the show; it's not as simple as whether tickets and seats were available; it's not as simple as how they were feeling – it is a culmination of everything."

The changes in theatre-going behaviour in the past few years have fed into a wide programme of research

National Theatre

broadly focused on the NT's audiences, their engagement with the organisation, and how the NT defines, segments and connects with theatregoers. As a result of that work, the organisation recently trialled 6.30pm start times at the South Bank (see boxout) to keep up to date with changing customer needs and behaviours.

Wheatley recognises that some substantial changes in consumer behaviour have remained long after social distancing rules faded away. To take one example, booking data from the NT shows that people's approach to buying tickets has changed since 2020, with many opting to book much closer to the date they attend the theatre than they did before. "It is such an interesting and challenging period," Wheatley says. "We have so many competing factors. Whether someone buys a ticket to see a show is not just about how expensive that ticket is, and our competitive set is not just West End theatres – our competitive set is also going to the cinema or sitting in and watching Netflix. We have to remember we can think holistically about how we can be pertinent in those moments when people have those 'need states'.

"My duty is to drive the voice of the consumer more broadly, rather than focus on specifics, as you then end up focusing on a small group, or a small market. My angle is to think about what else a person could book and who our competition is."

National Theatre
HOT CHICKEN

"The National Theatre is more than just an artistic expression or a heritage piece"

For art's sake?

The scale and breadth of the work carried out by the data and insight function at the NT has to take into account the organisation's funding model, which combines money from sources such as the government, ticket sales, commercial revenue and philanthropic donations, with the NT having status as a charity with royal patronage. This can mean having to work around resource constraints.

"We are a registered charity and we have to give back. That means, while I am used to seeing insights functions for a brand of this scale having large teams and large amounts of investment, we have to be more agile, entrepreneurial, and prioritise and think creatively," Wheatley says. It also means working with other NT teams, such as the learning department covering schools and communities, development, audience and marketing, and digital, all with their own goals and aims, and all of which manage data.

His job is akin to a conductor: gathering and disseminating data held in different parts of the organisation to create a unified whole.

Wheatley's ambition is to bring everyone at the NT together with the same holistic view. For this reason, he has been working to help colleagues more effectively share insight between departments. "I want us to be in a place where all of our data sets can be combined, we can take a holistic view of everything we do and democratise it across the organisation. I am never going to have a team of 50 people doing this, so I have to embed it in the ways of working. There's a big appetite for that."

Wheatley says that his role is to catalyse staff in other NT departments to carry out research and examine data to support their work and decision-making. "The best heads of data and insights functions in client organisations do well when it doesn't look like the research comes from them," Wheatley adds. "The research looks like it is coming from the people who need it, and they are there to make sure it grows

National Theatre

and is used by the organisation in a meaningful way. It means that, ultimately, the actions are driven by the people who care."

But can the insights department at the NT navigate the tension between commercial necessities, audience needs, nurturing talent and the creative process? "This place wholeheartedly realises the creative process is carried by everyone," Wheatley states.

"We are made to feel we are the theatre-makers. This is a factory that creates that work, and everyone plays a role in that. We are at this wonderful point where we can have our cake and eat it – we can achieve recognition and commercial factors. We are very fortunate to be in that position. At its core, this organisation realises that the National Theatre is more than just an artistic expression or a heritage piece putting productions on for the national record – it is a place that should be for everyone, and we do our best to ensure and drive that."

A question of timing

With audience behaviours changing, the NT wanted to understand the entire customer journey, pricing structure and membership offer as part of an analysis of current policies, and to inform any new initiatives. This research led to an ongoing trial of 6.30pm start times for some NT productions, a divergence from the traditional 7.30pm curtain call.

The research involved multiple audience focus groups – around 10 hours in total, with five to 10 people in each session – and in-depth interviews with a varied set of core and new audience groups at different life stages. Conducted mostly in-house, agencies including Baker Richards also worked on the project. The focus groups explored audience needs, behaviours and attitudes. They also concept tested and co-created a series of propositions with existing NT members and customers. "The participants were a mixed bag of people who came once every other year [to the NT] and had the potential to come more often," says Alex Wheatley, head of data and insight.

Parallel to this was a large-scale analysis of historical ticketing data to validate and explore the customer groups. Findings from the analysis fed into quantitative survey research using conjoint analysis, which examined the NT's database and an external sample to evaluate the potential demands of possible new approaches, such as changes to start times. In total, more than 8,000 people were interviewed or surveyed in the research. The project is still running, but the NT decided in late 2023 to trial 6.30pm performance times because of the considerable evidence of demand for them that came out of the research. The pilot, which began in February 2024, will focus on Tuesday and Thursday performances, with ticketing and attendee feedback data from Q1 to be examined to validate the demand.

Wheatley said feedback from research participants made it clear that 6.30pm performance times could be a draw for a diverse set of target groups. Reasons for the proposed change to showtimes centred on audiences wanting more flexibility to make the most of their evening, providing more time to grab food, get a post-theatre drink, or simply not have to rush to catch the last train.

The proposed change also chimed with the broader aim of the research to examine audiences' post-Covid lifestyles and habits, including varying working patterns and journey times, particularly for those living outside of London. This includes ticket prices, within the context of a cost-of-living crisis and societal inequality.

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The soft skills are the hardest

There. I said it. 'Soft skills' is one of the terms that frustrates me the most. After some digging, it turns out it was coined by the US army in the late-1960s, referring to any skills that didn't need the use of machinery. It stuck from there, hanging over everyone's heads like a gloomy cloud that nobody has been able to shake.

The reality has shifted far from this distant, old-fashioned notion. Soft skills include a wealth of important talents, from communication, influencing, critical thinking and leadership to collaboration, emotional intelligence, creativity and problem-solving.

There have been some attempts to rebrand soft skills into core skills, essential skills, people skills, or even power skills – but none of these has quite worked. So, we're still stuck with soft skills. If you look up 'soft' in the thesaurus, the adjectives you see there couldn't be further from the type of skills we're talking about here. 'Slushy', 'subdued', 'washed out', 'muted', 'delicate', 'easy going', 'mushy', and even 'witless' make the list of alternatives.

People skills, as I'm going to call them for now, are by far the most important tool you can have in your life and your career – especially in the fields of data, analytics and insights. Liz Henderson, executive adviser at Capgemini, said on the *Driven by Data* podcast (which I highly recommend, by the way) that "data is a people sport" – and she couldn't have been more on the money.

If you're playing to stereotypes (which I don't condone very often, but stick with me here), analysts – and anyone working with data and numbers – will be glued to a computer screen, in the corner of the office, speaking to nobody, unable to string a sentence together, crippled by social anxiety. We need to turn this narrative around. If we can't communicate the value of our insights to our stakeholders, they are pointless. If we can't convince our peers that they should base a business decision on the analysis we've done, there is no point us doing it. If we can't turn our data problem-solving skills into business problem-solving skills, and work with business leaders to find the common ground, we may as well pack our bags now.

Catherine King, global head of brand at Orbition Group, explains the importance of these so-called soft skills in the data and analytics industry: "The danger of working within the world of data lies in our overwhelming passion for it; we often overlook the fact that not everyone shares our level of enthusiasm. It's easy to assume that the significance or crucial insights are apparent to all, simply because they are to us. However, the reality is that, without strong communication and storytelling skills, being understood, supported and valued will always be an uphill task."

It's absolutely imperative that we close the soft-skills gap in the data, analytics and insights industries if we're to be taken seriously. To do that, we need to practise. We need to go against the stereotypical grain. Volunteer to present to the business. Be the one driving forward those relationships with stakeholders. I can't say this loudly enough – put yourself firmly outside of your comfort zone and embrace it with everything you have.

> **"I can't say this loudly enough – put yourself firmly outside of your comfort zone and embrace it with everything you have"**

If you feel as though your leadership skills could be improved, put your hand up to lead the next project in your team. If your collaboration skills need refining, volunteer to be the one to work with members outside of your business to collaborate on the next piece of work. If you want to up your communication game, keep your eyes peeled for ways you can do this, as often as you can. Write that blog post, make that phone call, offer your colleague a coffee and a catch up.

King also says: "The harsh reality is that merely completing our tasks is no longer sufficient to be successful. Regardless of our positions within the data field, it's crucial that we effectively communicate our achievements and the insights we've gained. Relying solely on our work to speak for itself is a thing of the past; we must actively articulate our contributions. While this shift may feel uncomfortable for some, those who embrace this new mindset will witness tangible results almost immediately."

Let's turn that tired old narrative around and make our industry's soft-skills shortage a thing of the past.

Is this the **real life?**

…Or is this just fantasy? With the artificial intelligence revolution gathering pace, synthetic data is the next new kid on the block for the research sector.

Liam Kay-McClean **reports**

How time flies. It has barely been a year and a half since generative artificial intelligence (AI) chatbots, powered by large language models (LLMs), became mainstream, but their impact on the world and the research industry is starting to look profound. And there is more to come, with synthetic data predicted by some to be the next stage of the generative AI revolution.

Synthetic data is, broadly, information that is artificially generated, typically by algorithms, rather than produced by real-world events. Synthetic data can be used, in part, to validate mathematical models or to train machine-learning models and LLMs. In a research context, part of its use could eventually stretch to creating synthetic personas to replace or augment human research respondents.

The Industrial Revolution of the late 18th and early 19th centuries showed the appeal of replacing low-yield and time-consuming hand-production techniques with factory and machine-made goods, and some argue that synthetic data could help to stimulate a similar revolution in data production and processing. The benefits could be numerous, reducing the time and cost of insight generation and freeing up practitioners for more strategic thinking and in-depth analysis. There is even an argument that it could help address the data-quality crisis facing the industry.

"It ought to help the average market researcher to be more strategic, as it is providing quick access to a useful data source, so less time is spent on process and more time can be spent on building hypotheses, interrogating data and developing insight," says Phil Sutcliffe, managing partner at Nexxt Intelligence. "I would hope that, if synthetic data becomes widely used as a cheaper data source, it frees up cash so the primary research that does happen can be more effective."

Ansie Collier, global director of innovation at MMR Research, says the early-stage product-innovation process could also benefit from synthetic data. "There is often a need to explore different options and prototypes, but the budget to produce or test all of that with consumers is a big barrier," she explains.

"If you are in the research and development space, the potential of using synthetic data is not to make the final decisions, but to narrow down your options so that, when you do engage with consumers, you get closer to the 'why' and a deeper understanding about what drives decisions. You are focusing that investment and optimising spend where it matters most."

Businesses are already taking a look, says Michael Hess, co-founder and chief executive at Emporia Research. "I don't imagine a world in three to five years where we are not relying on synthetic data in some part of the research process. We are already seeing large brands testing the waters."

"I don't imagine a world in three to five years where we are not relying on synthetic data in some part of the research process"

There is considerable caution, however. Synthetic data is largely untested and in early-stage development, and it is not yet likely to reach the levels of accuracy needed to act as an authentic replacement for human responses, or to build an effective simulacrum of a human.

Andrew Cooper, founder and chief executive at Verve, says comparisons between LLM-based survey responses and those from humans – with the model's predictions compared with a later survey of a sample of research participants – showed promise, but indicated that the technology is not yet at the stage where it is providing authentically human responses.

However, he feels that synthetic data has more potential to reduce burdens on respondents, rather than acting as a replacement. This could include replacing complicated, long or repetitive research tasks with AI-led research, using synthetic data. "If we can create really strong simulations of human beings, we could use AI to do onerous, dull or practical insight," Cooper says. "If you spend £100m on an aeroplane, you don't need to put trainee pilots in it and hope they don't crash it. Rather, have a simulation that helps them learn a lot and, when they eventually get in the aircraft, it all goes well.

"Why don't we simulate consumers in a robust way, so we can ask it the dull, dumb and learning questions, and then save the real people for the good stuff?" This could, in turn, he argues, make research more interesting for respondents and, ultimately, lead to better results.

The quality of the data fed into synthetic models needs to be robust – the 'garbage in, garbage out' rule of IT. This means being aware that synthetic respondents could end up perpetuating biases in existing datasets.

There is also the related issue of how to keep synthetic data up to date with real-world changes – the models are, in essence, 'backward looking' rather than predicting future changes in society and among consumers. For example, could a persona built on a 10-year-old synthetic database lose its ability to aid research looking at emerging consumer trends?

Will synthetic data render the market research industry obsolete in future? Cooper does not think that will be the case. "I see AI as a high-performance sports car – it has the ability to get us from A to B really quickly, but, unless you're a skilled driver and know how to use it well, it is very easy to spin out on the first corner and fall off a very deep cliff.

"AI can augment the quality of the research you get or diminish it. Human intelligence and cultural intelligence is very important to maximise what the AI can bring."

According to Steve Phillips, chief executive at Zappi, it is unlikely that buyers would want to replace spend on human-led research with synthetic data to inform major business decisions.

"I think that most clients, in most situations, would not trust a purely synthetic data answer," he says. "Not because it is factually inaccurate, but because they believe they have created something that synthetic data couldn't answer, as they have created something new. So, I don't think it will take over the industry.

"But, like AI, it will change it. You need to think about how you adapt and survive, and how you take the opportunities. If you try to ignore it, like AI it will have negative consequences."

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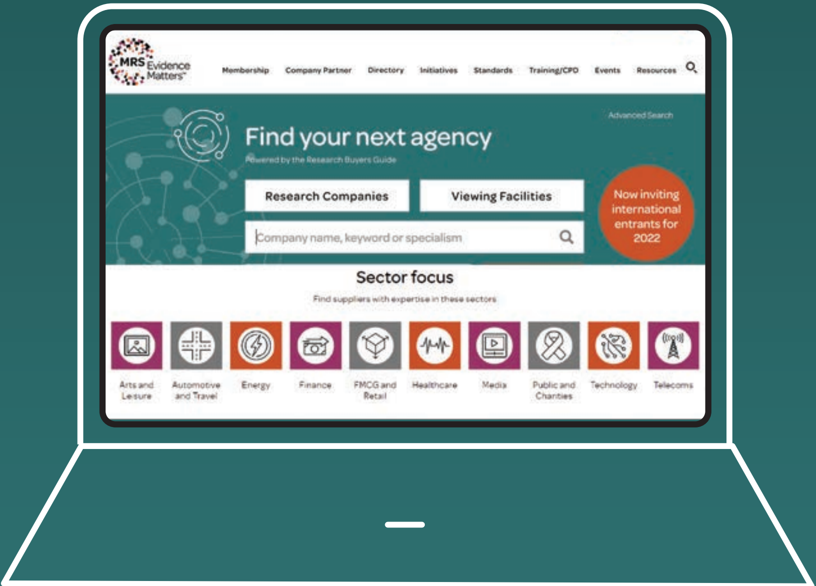

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Wake up, London!

Lorna Tilbian **looks at examples of value creation via partial sales – Ascential, Informa, GlobalData and Marlowe – that highlight the discrepancy between the sum of the parts and the whole**

As is well documented, the London market is moribund, with valuations far below those of other international stock markets, particularly the US. The reasons behind this are numerous and diverse, ranging from Brexit and regulatory red tape on the geopolitical front to Trussonomics and lack of growth stocks on the macroeconomic side.

Whatever the true underlying cause, investors – both domestic and international – have not been buyers, and valuations have drifted to the extent that companies are having to apply 'self-help'; in other words, doing the market's job of price discovery for it, by spinning off subsidiaries to private equity or breaking themselves up, as in the case of Ascential, the specialist information, data and analytics company.

Ascential has sold Flywheel, its digital commerce business, to global agency group Omnicom for $900m (£741m) and WGSN, its trend-forecasting business, to private equity player Apax for £700m. The combined proceeds have realised £1.2bn net, representing 126% of Ascential's market capitalisation before the announcement of the sales.

> **"Investors have not been buyers, and valuations have drifted to the extent that companies are having to apply 'self-help'"**

Together, Flywheel and WGSN represented 63% and 46% of Ascential's revenues and earnings before interest, tax, depreciation and amortisation (Ebitda) respectively, and the company is returning £850m (89% of Ascential's market capitalisation) to shareholders via a special dividend, with the balance used to pay down debt.

After completion, the remaining quoted Ascential Group will consist of its Lions business (comprising Cannes Lions, The Work, Lions Advisory, Warc, Contagious, and Acuity Pricing) and Money20/20, with its regional events and fintech intelligence platform Twentyfold. The group will now be led by Phil Thomas, as previous group chief executive Duncan Painter has joined Omnicom to continue leading Flywheel.

In a similar vein, data analytics and consulting company GlobalData is selling a 40% stake in its healthcare business to private equity player Inflexion for £434m, with an implied total divisional value of £1.1bn. The implied multiple is a punchy 22 times the division's June 2023 Ebitda, crystallising the high valuations that quality data and subscription businesses attract.

Meanwhile, Informa, the international events, digital services, business intelligence and academic publisher, is combining its Informa Tech digital businesses with US-listed TechTarget, with a view to building the number one player in the enterprise tech digital sales and marketing services market.

The combination underscores the value of Informa's 57% stake in the stand-alone $500m revenue TechTarget business, which trades on 15-times enterprise value/Ebitda versus Informa on 12 times. A tale of two listings that highlights the arbitrage between London's low ratings and Nasdaq's higher valuations.

Lastly, Marlowe, the provider of business-critical services and software for safety and regulatory compliance, is selling its Governance, Risk and Compliance business to Inflexion for £430m. The value of the divestment, which accounts for approximately 20% of revenues and 40% of Ebitda, represents 121% of Marlowe's market capitalisation prior to the announcement. The proceeds will be used to retire its debt in full and return £150m of surplus cash to shareholders. Its continuing operations in compliance services and occupational health will remain quoted, but with a new chief executive to be appointed (at the time of going to print), as Alex Dacre, its co-founder and chief executive, is joining Inflexion.

There is a common theme and thread running through all these deals: if the market does not ascribe a fair value to these quality assets, entrepreneurial leaders will find a way of unlocking and crystallising the value for themselves and their shareholders – but, sometimes, this exercise will include their own departures. The London market is losing talent as well as business.

How to normalise behaviour

In today's society, there is a multitude of behaviours that need to change rapidly or evolve – from adopting new, sustainable technologies to leading healthier lifestyles. So, how can we use behavioural science to accelerate behavioural change or technology adoption?

First, let's remind ourselves of Everett Rogers' diffusion of innovation theory. It segments a population into five groups: innovators, early adopters, early majority, late majority, and laggards (pictured, overleaf). He proposed that the diffusion of new ideas occurred through peers and one-on-one interaction, and that observability and social learning were key. When people can watch a product being used and see tangible benefits, they don't even need to trial a product.

A similar model, by Frank Bass, proposed that the adoption curve is led by innovators, with the rest of the curve made up of imitators: people who adopt because of social influence. Imitators learn from those who have already adopted and feel increasing social pressure to copy. They seek the reassurance of others' product approval, wanting to see tangible benefits and how a product works before they follow suit.

> ● **"Increased visibility can accelerate adoption by helping to initiate social chat around a new product or service"** ●

In this article, we look at two approaches to accelerate adoption and get the imitators, the early and late majority, and even the laggards to change their behaviour faster – effectively squeezing the adoption curve to make it narrower.

Both approaches make social change and technology adoption more observable. They illustrate how to communicate changing social norms indirectly – what we call 'covert social norms messaging' – to the rest of society; those who need a little more social proof than early adopters before they get on board.

Make purchases or new behaviours more visible to consumers

When change is observable, people can become more aware of growing trends. Our brains are wired to notice new things around us. Some products, such as solar panels and electric cars, or tech products, such as the iPhone, are highly visible. Studies have found that this visibility can help to drive a change in societal norms.

Think back to the days of the original iPod – those unmistakable white earphones helped everyone know that person was listening away. Launched in 2001, Apple had sold 100m devices by 2007.

Another example is solar panels. When researchers recently analysed spatial data of neighbourhoods, they found that the main driver of solar panel uptake was being within 200m of another house with solar panels – they show up in geographical clusters on maps. Even more robust evidence of this effect comes from a 2022 study on visibility and peer influence in durable goods adoption, by Bryan Bollinger, Kenneth Gillingham and colleagues. This found that the more visible solar panels are to other houses, the more likely it is that others will install them.

Researchers have also found that increased visibility can accelerate adoption by helping to initiate social chat around a new product or service. When Italian researchers analysed eight industrial product innovations in 2013, they found that early adopters played a 'word of mouth' role in disseminating information about a new product.

Reframe prices to signal the social norm

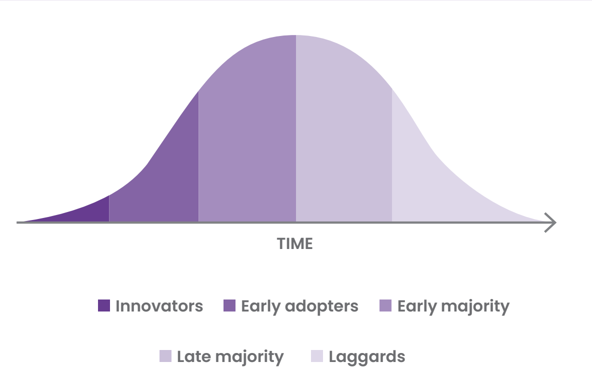
We can also accelerate adoption or behaviour change by covertly leveraging social norms; how we frame prices can signal what is the norm.

The 'standard price' for a product or service can signal that it is the one most people purchase, the social norm. Incentives, in the form of a discount or a surcharge, are usually offers designed for the minority, partly because it can take more time to process the payment. Take these scenarios for buying a takeaway lunch:

- Pay £5 or get a 20% discount for bringing your own containers and pay £4
- Pay £4 or pay a 25% surcharge for using single-use plastic containers and pay £5.

The discount signals that most people pay the standard price of £5, and few are prepared to do what it takes to get a 20% discount and pay £4. Conversely, the surcharge signals that most people pay the standard price of £4 and only a few pay the surcharge price of £5.

In 2018, researchers Alicea Lieberman, Kristen Duke and On Amir explored this in a series of studies, and found that when



consumers encounter a surcharge (vs a discount) they perceive the standard price to be what people commonly pay – £4 is the norm. Consumers also said they would feel more embarrassed or guilty if they had to pay a surcharge.

The researchers found these outcomes when consumers had to pay extra for a plastic bag versus bringing their own for groceries. In the UK, adding a 10p surcharge for plastic bags has dramatically impacted usage. By 2023, use of single-use supermarket plastic bags had fallen 98% since 2015, when retailers in England began charging for them, according to data from the Department for Environment, Food and Rural Affairs.

In Edinburgh, trials run by Zero Waste Scotland in 2021 and 2022 found that a 20p surcharge on disposable cups led to a 95% reduction in their use. Earlier trials found cafés that replaced discounts with an equivalent surcharge for disposable cups significantly increased the proportion of customers switching to reusables, by 50% on average.

This strategy could be applied to many other categories, such as buying refillable cleaning products or package holidays, where a surcharge is applied if a person flew rather than took the train or bus. How we frame prices and incentives sends a subtle message to people about what others think and do.

From insight to action

We need to pay more attention to the potential power of covert social norms and explore it directly in behavioural change research:

- For innovation research, explore with consumers what might help to make a product or service more visible and noticeable to them
- When researching pricing, explore consumers' perceptions around incentives – what are their emotional reactions, perceptions of social norms and behavioural responses to surcharges versus discounts?
- When researching societal change and adoption more broadly, explore with consumers what they noticed around them, and the triggers and the mechanisms in their context that prompted them to change
- Leveraging covert social norms, such as pricing frames, might have different effects on consumers depending in which of the five types of adoption groups they fit. Screen for and segment consumers into the five groups using objective measures, and analyse their differences through a behavioural science lens.

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A sensitive issue

Researchers have a duty to carefully consider the risks and consequences associated with their research. Research that is classed as 'sensitive' carries with it particular risks that need to be managed, with specific consideration given to the potential consequences of these risks. This includes risks and consequences for:

- Individual researchers
- Research participants
- Individuals, groups and communities connected with the research participants or the research topic or focus
- The reputation of MRS and its members.

To minimise the potential impact for the individuals or groups concerned, it is important that researchers undertaking sensitive research consider beforehand what potential risks may arise and to whom, and how these risks could be removed, reduced or best managed.

Learn about the subject matter

It's important that you are not overwhelmed by the topics you are researching, as this will make it harder for participants to feel comfortable talking openly. The best way to prevent this is to familiarise yourself with the subject matter ahead of the session.

You can do this through desk research, or by speaking to an expert or someone who has done similar research before. Experts such as charities and support networks might also be able to help you recruit participants.

Learning about the subject will help you decide whether you feel comfortable doing the research. If you react negatively to the subject matter, or have traumatic associations with it, it's absolutely fine to say you do not feel the project is right for you.

Think about the whole process

It's worth remembering that the participant's journey begins before they sit down and start talking to you. Thinking about the whole research process means considering things such as the language you are using in recruitment materials and information sheets.

Leave more time between sessions than usual

On a standard project, you might do three or four full days of research in a row. If you're working on something emotionally sensitive, this is probably not a good idea. In these cases, it's better to leave a day or so in between rounds of research – and do fewer sessions per day – as this gives you time to reflect on what you have heard and make sure you are ready to tackle the next round.

Build a rapport with participants

It can often be difficult for participants to discuss sensitive or personal issues, which means it's extra important to build a rapport, so they feel comfortable enough to participate.

This might involve including some time at the beginning of the session for the participant to choose what to talk about, or being prepared to go off script if the conversation moves in a different direction.

You could also go through the consent form and clarify that you are there to hear about their experiences.

Help people who need more support

It's tempting to give advice or try to help people out if you see they are in distress, or going through something difficult. As a researcher, you must remain objective – your role is to understand, not advise. However, it's OK to direct the participant to places where they could get more information and support following the session. A subject-matter expert should be able to let you know where to point participants who need extra support.

Deal with the emotional impact of the research

Listening to people's traumatic experiences can be distressing, especially if you're running several sessions on the same subject. Make sure you take some time to relax after the sessions – it's important to unwind and switch off from the work you are doing.

You could also take part in peer-support sessions, in which you take the time to reflect on the research with someone else, or support services offered by your organisation.

Content and trigger warnings

Clearly state the nature of the sensitive content, to give participants a fair warning. For example, you could use 'trigger warning: graphic violence' or 'sensitive content: discussions on mental health'. Choose an appropriate font and size. Ensure that the text is legible and easy to read.

Content warnings are verbal or written notices that precede potentially sensitive content. These notices flag the content of the material that follows, so readers, listeners or viewers can prepare themselves to adequately engage or, if necessary, disengage for their own wellbeing.

Trigger warnings are a specific variety of content warning that attempt to forewarn audiences of content that may cause intense physiological or psychological symptoms for people with post-traumatic stress disorder (PTSD) and other anxiety disorders.

PTSD and other anxiety disorders are mental health disabilities that have physical, emotional and mental symptoms triggered by stimuli that recall an individual's experience of trauma.

Individuals do not have control over what triggers them, but many have personal strategies they use to cope with triggers when they must be encountered.

Those strategies generally work best when the trigger is expected and can be prepared for in advance of the encounter. Hence the importance of content or trigger warnings: they give people the forewarning necessary to make use of the strategies that will decrease the harmfulness of encountering triggering material.

In the context of the data-collection activity, content warnings might be provided on the research invitation, spoken verbally during the research, or sent out as emails, for example.

They might include forewarnings of challenging moments in texts, material that will be covered in the data collection, videos viewed during the data collection, and topics that the researcher expects will come up in discussion.

> **"Participants must always be given the opportunity to skip any part of the data collection or step out of the room for a few minutes"**

Content warnings and trigger warnings are not intended to censure researchers. On the contrary, warning participants of challenging material can help their engagement by giving them the ability to take charge of their own health and wellbeing. However, participants must always be given the opportunity to skip any part of the data collection or step out of the room for a few minutes when the challenging material is being discussed, because their mental health and safety are more important than their engagement with the material.

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Rebalancing our offering to you

When I took up the role of chief executive in 2012, the world looked very different. CNN describes 2012 as the 'year of the reboot', when 'older established tech companies such as Microsoft, Yahoo and Nintendo all tried to restart their brands with bold new products and fresh blood in the executive suites'.*

And it was the start of radical change for MRS. We closed the monthly *Research* magazine, doubled down on digital, and launched a new quarterly called *Impact*. The vision was to focus on the outcomes of research; the business growth and real-world impact. The magazine won awards.

With the arrival of Covid, MRS didn't shut down – we threw resources into helping the sector and pivoted to take all of the organisation's services online. As a result, we reached new audiences and strengthened our global connections.

MRS saw growth as the country came back from the chasm of the pandemic and celebrated the biggest ever MRS Awards night in 2023. So, is it business as usual in 2024?

You may have read in Katie McQuater's editorial (page 3), that we are again rebalancing our offering: the July issue of *Impact* will be the last. We have not come to this decision lightly, or based on any single factor. Clearly, the era of mass print publications is coming to an end and is less sustainable, environmentally and financially.

There is still room in our publishing portfolio for print – our academic publication the *IJMR* has a growing database of subscribers (both MRS members and Sage subscribers). It will remain available on request to fellows and certified members as a print publication, as well as online.

Meanwhile, Research Live has been growing around the world, reaching more than 28,000 unique users every month, and with more than 60,000 followers across social media. Our US readership is now as large as that in the UK (around 35%), with the rest of the audience predominantly from India and Southeast Asia.

With such an international audience on Research Live, we have, as you might expect, been thinking: what can we do better (not what can we stop doing)?

Investing in digital is an investment in the benefits of membership, and our intention is to take the best of *Impact* into a more dynamic, digital context, and make it work better for you, our members. Too often I have heard people say 'Oh I wish I'd known about that special report you published last quarter'.

In this era of digital noise, MRS needs to respond to how members want to access and consume our content. But print is no longer a reliable means for us to get that content into your hands when you need it.

Our new Global Leadership Academy is another manifestation of this intent. Expect to see some very exciting changes on Research Live next year...

Impact magazine has made a major contribution to the revitalising of the MRS brand: it has delighted and instructed; it has been a standard bearer for B2B publishing, and was awarded as such. I have every intention of taking that spirit into the future.

* edition.cnn.com/2012/12/27/tech/web/top-tech-stories-2012/index.html

Sector and MRS news

MRS Awards 2023 case studies

The case studies from finalists and winners of the MRS Awards 2023 are now available online for members and Company Partners to view. These reveal the method behind the magic and provide an invaluable archive of award-winning best practice across the 15 categories. See mrs.org.uk

People and Talent programme

Over the past two years, the People and Talent programme has produced a range of guidelines and reports to help inform the sector's approach to managing talent. Go to the People and Talent hub to see the *Positive Retention Report*, Research Career Finder Tool, *Cost of Living and Inflationary Pressures* report, and *Amplifying Colleague Voices* report. See mrs.org.uk

Making the most of your membership

MRS membership shows your commitment to research excellence, connects you to a network of more than 4,300 professionals and gives you access to a huge range of specialist benefits.

Big discounts

Your membership saves you 30% on training
Keep developing throughout your career with the MRS Global Insight Academy, which gives you access, wherever you are in the world, to best-in-class global expert training, qualifications and on-demand digital courses that won't break the bank. Member discounts provide you with 30% off a regular one-day training course, a saving that is equivalent to your annual membership fee. And, of course, there are plenty of events that are free for members, including speaker evenings, professional webinars, and our policy and standards briefings.

Professional webinars

Enjoy live webinars from industry experts
As a member, you get access to 10 free professional webinars a year, plus an in-person speaker evening held at our London head office. Our programme focuses on the latest trends in the market research sector, including artificial intelligence, sustainability, storytelling and data integrity. Normally priced at £30, this benefit can save you £300 per year. Run by experts, these events give you the opportunity to ask the presenter questions and count as one hour towards your CPD.

Mentoring

Grow with our award-winning Mentoring Scheme
The specialist Mentoring Scheme for research professionals, winner of the Best Membership Engagement in the Association Excellence Awards 2023, provides you with a framework to develop a broader set of competencies and interpersonal skills. Mentoring can help you review your approaches and optimise your thinking. As a member, you can apply to be a part of the Mentoring Scheme. Our personal matching service means that you are matched with an experienced senior professional. The spring 2024 mentoring application period is currently open and closes on 19 April.

Access your benefits

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

www.mrs.org.uk/membership/benefits

Diary dates

Conferences

Equality Summit

Bringing together insight leaders, equality champions and allies who are working to promote inclusion, this conference challenges the status quo and reviews best practices in designing inclusive research.
16 May

Storytelling Conference

Join our expert panel of speakers to hear storytelling tips and tricks from PR professionals, film-makers, influencers and journalists, as well as marketing and insight professionals from leading brands.
13 June

Training Highlights

Reuse and repurpose insight

Discover how to synthesise and structure existing datasets to overcome complexity and answer new questions effectively.
24 April

Semiotics made practical

Learn the basic theories and techniques, including how semiotics fits into the wider research process, helping to analyse consumer thinking.
25 April

Advancing your moderating skills

Understand group process and dynamics, self and respondent management, and troubleshooting difficult situations with this advanced course.
30 April + 2 May (2 days)

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

Project management masterclass

Get equipped with the tools to control the project management life-cycle, including scoping, planning, implementing, reviewing and measuring.
1 May

Mastering data quality in online research

Get equipped with the knowledge, tools and best practice techniques to enhance data quality in online research projects.
7 May

Narrative by numbers

Learn the simple and effective rules of data-driven storytelling to ensure data is at the heart of powerful and purposeful stories.
8 May

Professional Webinars

Make that change

Overcome resistance to change and root out hidden assumptions and beliefs holding you back.
9 May

Impactful projects on climate change

Hear how a project between Bricolage and Visual Signo used semiotic and ethnographic approaches to tune into audience cares and link these to climate relevant topics.
22 May

True data integrity

Discover how the three elements of data collection – the panel, survey, and data cleaning post-field – can be used to deliver data you can trust.
12 June

Why we buy

Based on his new book, Harvey Whitehouse explores the science of consumer behaviour through the lens of our evolutionary history to help shape marketing approaches.
27 June

The TikTok takeover

Hear how TikTok has enabled fundamental changes to the dynamics of two different markets, and how to interpret TikTok data to gain consumer insight.
2 July

7

Hannah Perry **is lead researcher at CASM, the digital research unit at think tank Demos, where her work includes programmes to investigate disinformation and conspiracy theories in local information ecosystems. Prior to Demos, Perry led research and social impact programmes with a focus on harmful attitudes and behaviours online and offline**

1 What is the biggest challenge of researching disinformation and conspiracy theories?

Not having data access to the biggest social media platforms, which restrict access from external researchers, or only make it available for a significant fee. While the EU's Digital Services Act includes transparency provisions for accredited researchers, the UK's Online Safety Act doesn't mandate this, so access remains very limited.

2 How can regulators and platforms draw the line between misinformation and freedom of speech?

Lines are already drawn in law surrounding speech that we recognise is harmful and, therefore, illegal, so the task for regulators and platforms is about ensuring that illegal content is removed rapidly. Where there's speech that can be harmful but legal – which might include misinformation – it's more helpful to recognise this as on a spectrum of risk, where sensitivity to the topic and context is crucial for decision-making. 'Speech' or 'content' decisions need to be incredibly nuanced, so it's important that platforms invest sufficiently in sensitive oversight and consider how they develop these policies (and with what level of citizen engagement) very carefully.

3 Are you concerned by the proliferation of generative artificial intelligence (AI)?

Yes, I'm concerned that the adoption of large language models and audiovisual generators has accelerated before we have sufficient safeguards in place – especially in such a big year of elections. These innovations challenge our understanding and assumptions about what is 'real', accurate, and 'who' is acting. When trust in institutions and political actors is already very low, it can be potentially damaging to values that we hold dear, particularly truth. Political and corporate leaders will need to act rapidly to establish, transparently, how they intend to use these tools, so trust in their communications remains.

4 Can generative AI be effectively and ethically moderated?

Generative AI companies and platforms have significant responsibilities to improve the approach to moderation, whether that be ensuring users have clear guardrails for how tools should be used, providing clear information about potential inaccuracy of content, or investing in 'prompt hacking' and 'red teaming' exercises that can be used to mitigate model misuse. I don't think social media platforms need new rules for synthetic content, but they should double down on enforcement, removing harmful content whether it's generated by human or machine. Synthetic content should be labelled, or enable labelling, so users have transparency of its provenance.

5 How important are citizens in helping to answer these questions?

They are crucial to tackling digital policy challenges. Sadly, digital skills and jobs remain the preserve of an elite few, which means a range of voices and risks are not considered in the design or regulation of powerful technologies. This has resulted in technologies incentivising behaviours that aren't conducive to a society that cares about equality, truth and mutual respect. Deliberative research methods can be very effective for bringing in voices at multiple stages of digital policy development.

6 You are a qualified secondary school teacher. What lessons have you brought from teaching into your research career?

Teaching taught me the variety of complex factors that might affect how someone behaves – and that, often, 'the solution' isn't the one you had in mind. It reinvigorated my love of observational and qualitative research; it taught me to start with open questions, humbly listen to the challenges that people are facing, and be ready to reconsider and learn from others what policy solutions might actually work.

7 Are you optimistic about how democratic systems are evolving in the digital age?

No, I haven't seen sufficient evidence that they are evolving fast enough. It's crucial that all citizens have access to the internet and digital civic literacy skills, so they can source good-quality information and deliberate confidently with others. National and local government could be using online methods more effectively to enable participation in policy-making, as a means of rebuilding trust between citizens and their political representatives.

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NOTE for all MRS Company Partners and Members
The use of RAS Accredited Recruiters is **mandatory when buying qualitative research recruitment services**. When procuring recruitment services you must ensure that you or your recruitment provider use only **RAS Accredited Recruiters**