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ISSUE 25 APRIL 2019

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Clear view

Do I dare mention the B word? It's a dangerous game to play for so many reasons – not least because by the time this magazine hits your desks, the only certainty is that things will have changed.

No business meeting or night in the pub is complete now without some Brexit soul-searching – this strange engrained ritual of communal despair has become common practice.

In our profile of Demos' Polly Mackenzie (p24), she claims to be leaving Brexit to the politicians while she concentrates on "the rest of the stuff". Can you remember when there really was any other business? The fundamental problem with the referendum was offering a simple choice to something that manifests into unbelievably difficult political negotiations. Dissatisfaction guaranteed.

We're an industry brought up on asking questions; understanding how nuance and framing can influence and skew respondents. Few decisions, let alone epoch-defining political ones, are a binary choice nowadays. Combine that duality with an era of shouty social media and micro-targeted messages and we're in a pernicious place.

We all need to raise the quality of the debate – the complexities of life require discussion, careful thought and reflection.

This was the order of the day at MRS's annual conference Impact 2019 (p18). I love the two days of immersion – of having your own ideals challenged (Nicky Morgan); of being forced to question your work practices (Andrew O'Hagan); of listening to the benefits of belief systems outside your own (the Rev Richard Coles) and learning about how market research can absolutely lead to people's lives changing for the better... and that's just a few select highlights.

The central tenet to everything I've just mentioned is listening and engaging – which equally applies to our long read on voice of the customer (VoC) programmes (p30). In it, we learn how some brands have instigated carefully crafted VoC systems that have resulted in significant positive business impact. These are perfect examples of going beyond basic questions to listening in the broadest context and being willing and able to respond.

If a business decides to listen and to adopt the current vogue for transparency, it must be ready to hear uncomfortable truths. Some are going even further – into the realms of radical transparency (p60) where being clear, honest and visible gains momentum.

Radical transparency pushes the boundaries of market research, almost driving it into reverse, so customers can ask searching questions of the business. But this is a high-stakes game; you can't be a little bit transparent and the internet exposes most skeletons these days.

So, let's hope that the next wave of politicians learn from the Brexit fiasco and some businesses, and adopt their own form of radical transparency.

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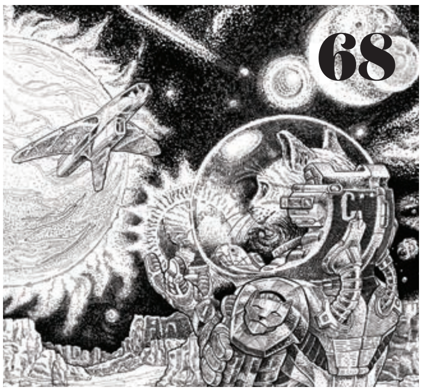

Columnists

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Taking a little time

Sir John Hegarty once presented some work to Sir Paul McCartney. Paul, as clients always do, asked for changes to be made, and requested revisions the following day. “Um, could we have until the end of the week?” John asked. “After all, nothing decent is ever done quickly.”

“That’s not true,” said Paul. “I wrote *Yesterday* in 15 minutes.”

To this day, John still regrets not supplying the obvious rejoinder: “Well think how much better it could have been if you’d only taken some time over it.”

Who’s right in this debate? Does more time always lead to better work? Well, it’s complicated. But there is one rule that holds – there is a special value to uninterrupted time. Paul might have written the tune to *Yesterday* in 15 minutes (the lyrics took months), but he didn’t write them to order in the space between a conference call and a budget meeting. Inspiration can be lightning-fast, but you have to wait for it to strike.

It’s this finding that might explain why improvements in technology have had so little effect on business productivity. Technology gives a seductive immediacy, but at the expense of discretionary time.

The world of work 30 years ago was, in many respects, worse than today – not least because what you could do was heavily constrained by where you were. You could only make a phone call if you were at your desk. In other respects, it was far better. This was because, er, what you could do was heavily constrained by where you were.

So, when you weren’t at your desk, no-one could phone you. By opting to go to one place rather than another, automatically you were compelled to focus on something – in the photocopier room you made photocopies; in a meeting room you met.

To understand why fragmentating our time and attention is such a problem, you need simply to understand the non-linear algebra of productivity, where 6 x 10 does not equal 60. As Paul Graham explains in his essay *Maker’s Schedule; Manager’s Schedule*, what you can accomplish in six periods of 10 minutes is only a fraction of what you can achieve in one uninterrupted hour. Every time you switch from one thing to something else, you lose a portion of time simply in changing your focus – email is ghastly in this respect.

“Every time you switch from one thing to something else, you lose a portion of time simply in changing your focus – email is ghastly in this respect”

What distinguishes the internet revolution from previous advances is that it revolutionises how we can spend our time. In our leisure time, where we exercise choice independently, the results have been largely beneficial. In the world of work, where our time is spent at the behest of others, the results have perhaps been net negative.

What if we could all be more productive; if we organised a video conference rather than spending a day travelling, say? Or worked from home one day a week? Or began work early at home and then commuted later (meaning you can easily work on an empty train)? Or deliberately ignored emails for four hours a day? Alas, all these productivity-boosting behaviours risk making you look lazy. The very fact that they are easy makes us reluctant to adopt them for signalling reasons – at least until a significant number of our colleagues do the same.

In addition to this, the utterly absurd notion of being paid by the hour is a disincentive to becoming more effective. *The Telegraph* featured 50 high-flyers who work a three-day week; unfortunately, the reward these people get for being spectacularly efficient with their time is a 40% pay cut.

In one New York advertising agency you can opt to work a four-day week in return for 90% of your five-day salary. The more mathematically inclined will notice that looks wrong. In fact, I suspect it simply recognises reality. More than 60% of people would like to work a four-day week; unfortunately, what everyone knows is that, in reality, this often means being paid 80% of your salary for producing just as much work as you did before.

World view

News, analysis and insights from around the globe, edited by Katie McQuater

"The odder ideas in 'New Davos' might seem ambitious, uncertain and even crazy, but perhaps they are the appropriate ones for the world economy in 2019."

(p12)

"Cuba's El Paquete Semanal is the result of an evolutionary process of cultural, technological, economic and political forces that have been in play for decades."

(p14)

Approximately one-fifth of South African women aged 15-49 are HIV positive

(p16)

The volume of whisky sold in 2019 in Australia is expected to be 25.4m litres

(p15)

Global billionaire wealth increased from $3.4tn in 2009 to $8.9tn in 2017

(p12)

In the first 40 days after Cuba began allowing 3G internet mobile access in December 2018, 1.8m people bought the packages

(p14)

"It's too easy to think about fake news as happening to other people. But the convergence of rapid technological developments, polarised politics and the cognitive limitations of humans guarantees that, at some point, every one of us is unwittingly likely to fall victim to fake news."

(p10)

Beyond the truth

Research on fake news carried out by the BBC has found that in India, projecting socio-political identity is more important than verifying whether or not something is true.
By Santanu Chakrabarti

If you have been reading, watching or listening to the news over the past couple of years, you will be familiar with the term ‘fake news’. You have, perhaps, also heard about the possibly terrifying consequences of the uncontrolled spread of fake news: the subversion of democracy in countries like Nigeria and Kenya, say, and even the destruction of life in countries such as Myanmar and India.

But why does the ordinary citizen share fake news? If we agree that most people do not really intend to cause widespread harm and neither are they ignorant nor unwise, why would they still share fake news on social media and chat apps?

As our research project in India, Nigeria and Kenya – conducted with Third Eye, Flamingo and Synthesis – found, more often than not, the act of sharing fake news on WhatsApp and/or Facebook is not about the transmission of information. It is about the projection of people’s selves and beliefs, and it is about doing their civic duty in sharing information of perceived value (especially when there is a lack of trust in media in politically polarised environments).

Technology has made sharing of information – and misinformation – easier than ever, while consumption, reflection and deep learning are as mentally labour intensive as ever. Because of the volume of information people have to process, they have to resort to cognitive shortcuts or heuristics in assessing how valid and shareable the information is. This creates gaps that easily allow fake news to pass through.

However, while fake news is prevalent in both India and the African markets studied, its nature and the reasons for its spread differ. In the politically polarised climate of India, the sharing of fake news becomes a way of validating and projecting one’s own socio-political identity. Therefore, the accuracy of the information shared is often of secondary importance. Or, often it’s not the factual truth that matters as much as the emotional truth of the piece of information.

In India, four types of fake news messages are particularly effective at bypassing the critical filters of a wide swathe of the citizenry: Hindu power and superiority; cultural preservation and revival; progress of India as a nation and associated national pride; and finally, the personality and prowess of prime minister Narendra Modi.

Note, though, that this need not be limited to people on any one side of the political spectrum. When it comes to messages around nation building and the progress that India is making in the world, people of all political persuasions share these messages without verification. It's also worth acknowledging that the act of verification is cognitively difficult – and in many cases, people simply do not even know how to verify.

In India, we see that if someone you trust has sent you information, you share it without worrying too much about its authenticity, or where it originated from. You don't even attempt to verify it, because frankly, when you are bombarded with so much information, just how many times a day could you possibly do that? Sometimes, when you are uncertain about the information provenance, you share it in your network hoping someone you trust will verify it. Paradoxically, though, you have ended up spreading fake news.

The situation is compounded in India by the prevalence of memes and images – especially via WhatsApp and Facebook groups – as a key format of fake news, rather than online articles (which are, in some ways, easier to detect and prevent spreading). Structural factors are important in this: in India, the precipitous drop in data costs in just a couple of years has removed a barrier to the widespread viewing and sharing of content – abetting the spread of fake images and videos, alongside genuine ones.

However, in Nigeria and Kenya, data costs are still a barrier – and partly because images and video use more data, sharing of information and misinformation is largely still limited to text. Text information is, in some ways, easier to verify, and we see that citizens in Nigeria and Kenya are keener to get to the actual origin or source of the information than their peers in India. In fact, in both of these markets, we found that younger citizens are really eager not to spread information that has the potential to cause harm, especially fake news messages that seek to widen rifts among tribes or religions.

The messages most resonant in the fake news ecosystem are not the most societally polarising ones, but scams and scares. But citizens in both Kenya and Nigeria, while much more cognisant of the risks of spreading fake news, also tend to overestimate their ability to spot it.

It's all too easy to think about fake news as something that happens to other people – those less aware, less media literate, less pick-your-attribute. But the convergence of rapidly developing technology, polarised political environments and the cognitive limitations of human beings guarantees that, at some point, each and every one of us is unwittingly likely to share or fall victim to some colour of fake news. Fake news is not a purely technological phenomenon but a social, political, and psychological one, given extra wings by technology. And the only way to address it is to address the underlying socio-political underpinnings of the phenomenon.

Santanu Chakrabarti is head of audience insight at BBC World Service. Both the India and Nigeria/Kenya full reports are available at bbc.co.uk/mediacentre

- Coverage of fake news in the Indian media grew by nearly 200% between 2015-2018
- Two significant categories of fake news shared within private networks in India are 'scams and scares' (37%) and 'national myths' (30%)*
- But media reporting on fake news related to 'scams and scares' constitutes only 0.7% of coverage
- The motivations for sharing fake news in India are: to verify within the networks; civic duty; nation building; and expression of socio-political identity.

* Indicative only. According to the researchers' analysis of the corpus of WhatsApp and Facebook messages collected during the fieldwork

The other side of Davos

Beyond the world's elite gathering to discuss the globe's problems at the World Economic Forum, Tim Phillips **finds a 'New Davos', focused on more practical approaches to understanding people and using data to make a difference**

Some claim, not unreasonably, that the CEOs and politicians in Davos – flown in by 1,500 private jets and helicopters to debate how we should reduce our carbon footprints – experience reality second-hand. But this is precisely why the annual World Economic Forum still takes place in Europe's highest town: it is so inaccessible to the general public that the global elite can do novel things once a year, like walk down a street. That said, Davos has its own class system, with the colour of your badge determining the events you can visit – and even which of the streets you are permitted to walk along.

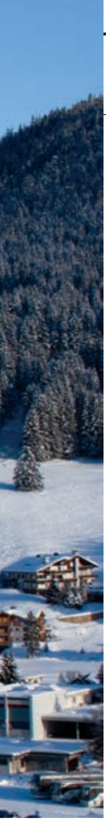
One suspects, then, that this may not be the ideal venue to discuss the disruptive forces of populism, inequality, job insecurity, and the sense that unrestrained capitalism needs to be reined in. On the main stage, the panels arranged for Davos's upper classes often manage to agree simultaneously that we all must do something, while rejecting anything that would reduce their personal wealth or the profitability of their businesses.

For example, Michael Dell – net worth \$26bn and the chief executive of the company that bears his name – was asked whether he agreed with the suggestion that the highest marginal rate of income tax should be 70% – a plan supported in a survey by almost half of Americans (three in four Americans support some level of higher taxes for the rich – see panel, below). "I don't think it will help the

Global billionaire wealth has increased from \$3.4tn in 2009 to \$8.9tn in 2017

(UBS and PwC Billionaires report 2018)

3,000 participants attended the World Economic Forum – 78% were men



growth of the US economy," he said. "Name a country where that's worked?" Sitting next to him, Erik Brynjolfsson, a professor of economics at MIT, pointed out that – until comparatively recently – it had worked rather well in the US.

This 'Old Davos' elitism captures the headlines, but the World Economic Forum has a less-reported fringe, in which more practical and imaginative ideas are discussed in detail in smaller venues. No-one could claim that the attendees at Davos are diverse or representative (only 22% of them are women, for example) but – away from the main stage – the Forum now offers a wide range of perspectives and ideas.

Ordinary people

Many sessions are built around the need to listen and respond to the changing opinions of ordinary people, whether they are citizens or customers. One of the more ambitious examples is 172-year-old Philip Morris International (PMI), best known as the manufacturer of Marlboro cigarettes, but now betting its business on e-cigarettes instead. PMI is officially 'working for a smoke-free future', actively telling its customers not to smoke – or, if they want to consume nicotine, to use safer e-cigarettes instead. Among many changes, the company is now committed to transparency – for example, publishing all its biological research.

Forecast trends

Marian Salzman, senior vice-president of communications, explained that PMI had recruited staff to monitor social media 24 hours a day and debate with the public, one by one, about the comparative merits of vaping. On the one hand, this is because PMI cannot advertise in most countries, so it has trouble persuading smokers to change their point of view. On the other, "[marketing] is a dialogue, not a monologue as it once was," Salzman said. "Our whole point of view is not to tell people what to think – it is to hear what they think and then for us to incorporate it."

An uncertain future caused many sessions to focus on innovations to forecast trends. Robert Kirkpatrick, the director of UN Global Pulse (UNGP), has been discovering how to use commercial data to learn more about the world. For example, getting access to the top-up data for Rwanda's mobile phone users has allowed UNGP to predict local food shortages with 89% accuracy, he explained. Additionally, a 10-person team uses social media sentiment analysis to map the location of hate speech in mainland Europe, with the research helping to manage risk for refugees migrating through the continent.

WorldQuant, an investment management firm, has become so sophisticated in its use of big data for trend analysis in financial markets that it is launching a project to apply the techniques in areas such as healthcare, using data from 1,000 data sets.

The idea is to apply its expertise in machine learning to better predict the impacts of social policy or innovation. However, founder and chief executive Igor Tulchinsky said commercial success and the public good require different standards of certainty, and less tolerance of risk. "In finance, if you're right 50.1% of the time, you're ahead". As a result, extending predictive technologies from wealth creation to curing cancer will not be an easy leap.

Disruption has also affected Sir Martin Sorrell – formerly chief executive of WPP, but now of S4 Capital – who gave his interview in a local church after ascending from its crypt. Arguing that the future of advertising will be microtargeted "assets at scale", he explained how one of his clients had created a campaign with more than a million possible executions using artificial intelligence (AI). Sir Martin's message is microtargeted too these days, however: he delivered it to an audience of 19.

Loosening their ties

In uncertain times, a surprising number of Davos delegates were willing to tune in to new ideas, occasionally loosening their ties to do so. On one side of the road, there was a packed 'New Davos' crowd to see Mother Ocean ('author, evolutionist, founder and spiritual director') workshopping with entrepreneurs on 'the power of heart intelligence'. I crossed the carriageway to join the sparse audience that was listening, respectfully, to a panel of macro-economists debate policy options for the European Central Bank. It was a decision I instantly regretted, because it's the sort of sterile discussion that has been going on for decades.

The odder ideas in 'New Davos' might seem ambitious, uncertain and even crazy, but perhaps they are the appropriate ones for the world economy in 2019.

45% of US-registered voters favour increasing the marginal tax rate on income of more than $10m a year, to 70%

54% strongly agree and 22% somewhat agree that 'the wealthiest Americans should pay higher taxes'

(Morning Consult and Politico poll of 1,993 registered voters, February 2019)

The perfect package?

In Cuba, where internet access is limited, an analogue approach to content distribution has flourished in response to a desire for information and access to culture. By Flamingo's Ingrid Recio Jiménez

For decades, Cuba has remained under a strict blockade from the rest of the world. A combination of the state's historical monopoly on broadcast, lax copyright laws and limited internet access has turned the country into an analogue 'on-demand' market. This has created the perfect environment for alternative sources of information to grow.

The most significant of these is El Paquete Semanal ('The Weekly Package'): a 1TB bundle of content, delivered weekly to 600,000 subscribers, with the latest films, TV shows, magazines, documentaries, video games, mobile apps, and YouTube videos, all for $2. Completely offline, it's delivered by being transferred onto customers' hard drives.

Collated and distributed via an underground media-smuggling ring, El Paquete Semanal allows people without internet access to obtain information just days, or even hours, after it has gone online elsewhere in the world. *Game of Thrones* is back this April, and, as with all previous seasons, Cubans will be able to watch every episode just hours after it's aired by HBO. Ditto *The Great British Bake Off*, which also features.

According to academic Fidel Alejandro Rodríguez, El Paquete Semanal is the result of an evolutionary process of cultural, technological, economic and political forces that have been in play for decades. It goes beyond a response to scarce internet in Cuba; it's the next step in a series of actions caused by a demand for information and access to culture that's engrained within the national identity – the same need that led to the creation of VHS 'banks' in the 1990s and camouflaged illegal antennae designed to catch American TV channels in the 2000s. In a country where mobile data costs half the salary of an average Cuban, connectivity is considered a luxury and a point of difference.

Cultural researcher Hamlet López describes El Paquete Semanal as "a socio-technical platform that initially could have been born as compensation for the lack of internet access, but now has personality and its own identity".

In fact, its product is not the content itself, but the ability to distribute quickly. Cubans aren't just paying for *Game of Thrones*, they're paying for the chance to watch it as soon as possible. They need synchronicity, and El Paquete Semanal sells it every week.

But there are a number of factors that could affect its future. The first is the increasing level of internet access – in December 2018, the Cuban government enabled universal 3G mobile internet and connectivity was slowly reaching homes in Havana. The second is the new constitution, which might eventually toughen copyright laws and eradicate piracy.

Roger Juaristi and Luis Miguel Marín of Cuban digital marketing agency HighVista, which introduced advertising content within El Paquete Semanal, believe the internet will lead to its disappearance in the next few years. The two use apps on their phones to access pirated online content and claim younger generations are more app-driven than browser-based.

But Yino, who owns an El Paquete Semanal distribution network, believes that as long as internet is unaffordable for many, his business will have subscribers. Older generations still need to learn how to interact with the web, he says, so they will keep buying the service until they feel comfortable enough to go online.

Brands looking to operate in Cuba need to understand its defining cultural values and adapt to this unique media landscape. Google now has servers in Cuba, YouTube has adapted to the country's connection speed, and Facebook is facilitating connectivity with the rest of the world – during the recent tornado, it allowed Cubans to update one another on their safety and whereabouts.

Whatever the consequence of the changes to connectivity, Hamlet López believes Cuba is in a privileged position. "Being this late on the world wide web scene is not a disadvantage; quite the opposite," he says. "Cubans will have the opportunity that other countries didn't have: to think about the kind of internet we want for ourselves."

- Cuba opened state-run internet cafes in 2013 and citizens have had access to home internet and public Wi-Fi hotspots since 2017
- Almost 50% of Cubans have a mobile phone
- In the first 40 days after the country began allowing 3G internet access via mobile phones, 1.8m Cubans – of a population of 11m – bought the packages.

Distilling data

For a new whisky brand, launching in Australia required more depth than qualitative research could offer, so it turned to data-driven modelling to help it estimate how well the tipple would sell. By Katie McQuater

Scotch is no longer consigned as an old man's drink. In recent years, distilleries have joined gin and rum makers in launching new brands as they look to target a younger demographic of drinkers.

Pernod Ricard-owned Chivas Brothers launched its Allt-A-Bhainne single malt in 2018. The product uses semiotic codes that aren't typical of the single malt category, which historically trades on tradition and heritage – in contrast, the Allt-A-Bhainne distillery opened in the 1970s.

As such, Chivas Brothers wanted robust data to help it build confidence internally and secure marketing budget around the launch of the new whisky in the Australian market.

Rather than commissioning qualitative research, the company worked with insights agency Skim to produce a volumetric prediction model aimed at forecasting the brand's potential success and highlighting marketing priorities.

"The client was looking to test the concept, profile the potential buyers for marketing purposes, identify key occasions that consumers would associate to this new single malt, and get a robust estimation of the potential volume of sales in the first three years from launch," says Tommaso Gennari, senior analytics consultant at Skim Group.

Skim conducted an online quantitative survey of 1,200 whisky buyers in Australia to test concepts, profile potential buyers and estimate consumer selections through choice-based conjoint.

Pernod Ricard Australia also gave the company three years' worth of sales data to use for the expected competitive set.

The team could draw on both survey data and survey-based choice modelling, and the sales data, to develop a volumetric estimate of seasonality and the impact of distribution on whisky sales.

The conjoint was designed to measure the impact of awareness of the new single malt concept on consumers' choices. The best price at which to set the whisky was also investigated as the conjoint simulator – which was calibrated to market share – included the possibility of switching between two prices and gave the base share of preference of the new whisky that was then used in the volumetric predictive model.

The researchers could predict how many cases would be sold each week for the three years after the launch by combining the share of preference from the conjoint simulator with the seasonality and distribution effect from the sales-data analysis. They also combined output from the simulator with other aspects of the research to illustrate what impact different price choices, distribution and marketing activity could have on sales and positioning.

The most challenging aspect of this approach, according to Gennari, was summarising and explaining the relative role of the assumptions the researchers were making when using the predictive model.

Alongside the volumetric model, the survey research found that the Scottish name was a barrier for some consumers, while many liked the bottle's visual appearance and the taste of the peat.

Though Skim did not give a 'yes or no' answer to the price question, it outlined the implications of each pricing choice in terms of volume and positioning.

"Maybe unexpectedly for us, the client chose to go to market with the higher price, despite a lower price generating more volume," says Gennari.

This was because the company wanted to keep a "differentiation in premiumness of offerings within the portfolio," says Gennari, but was supported by the "evidence that it could still hit its volume target at the higher price – if it was able to produce a certain level of market awareness and reach a certain distribution".

Whisky in Australia

The volume of whisky sold in 2019 is expected to be 25.4m litres

Revenue in the whisky segment is expected to reach US$1.3bn this year

(Data from Statista)

A safer approach

HIV prevention in South Africa requires more than a single programmatic approach, as young women are influenced by behavioural factors such as relationship goals when it comes to safe sex. By Andrea Rademeyer

HIV has a significant impact on communities in South Africa, where approximately one-fifth of women in their reproductive years (aged 15-49) are HIV positive. Empowering and understanding adolescent girls and young women (AGYW) aged 15-24, who are at the highest risk of contracting HIV, is critical to managing its transmission.

This was the aim of a recent study funded by the Bill & Melinda Gates Foundation through a cross-continental partnership between behavioural science and design consultancy Final Mile Consulting, strategy and innovation company Upstream, the AIDS Vaccine Advocacy Coalition in the US, and market research company Ask Afrika in South Africa.

The goal was to understand HIV prevention-related decisions within the context of young women's lifestyles and their take-up of prevention products – such as condoms or oral, injection or ring HIV prophylaxis drugs – to help reduce HIV transmission in South Africa.

The study forms part of the HIV Prevention Market Manager project, which partners with various organisations involved in HIV prevention research globally to ensure that there is a portfolio of region-specific behavioural-change solutions available and accessible to those who need them most.

The study sample was selected from regions in South Africa with a high incidence of HIV, where young women are at the highest risk – it was split between urban and rural areas in the KwaZulu-Natal and Mpumalanga provinces.

Goals-based behaviour

The research team used a behavioural-design approach, including qualitative research with 240 young women aged 15-24, followed by a quantitative segmentation phase with 2,000, to get to the core of their decision-making journey and obtain a nuanced understanding of what influences them. The influencers for young women included matriarchs (mothers, aunts and sisters), community healthcare workers and nurses, as well as men.

The research design combined gamification with exploratory in-depth techniques, involving young women making decisions in realistic scenarios. The sessions were engaging, fun, and offered a safe space for respondents to share stories openly.

The intention was to understand how young women typically navigate sexual decisions and sustain safe sexual behaviour throughout their life. Young women's lifestyles and behaviour are not homogenous, the research found, but rather based on goals, relationship dynamics and risk perceptions. The findings revealed that many behavioural factors influence their decisions in terms of safe sex. For instance, taking an HIV test is often seen as a preventative measure, and HIV only becomes a focus for an individual who has contracted the virus and is treating it; the sentiment was: 'If I don't have it, why bother?'

Relationship goals appear to be a key driver in sexual-health behaviour – for example, the use of condoms can imply a lack of trust in a relationship, even if it is common knowledge that not all parties are

Understanding the path to progress

Based on the findings, the research team developed a behavioural-journey framework with five stages that explain the relationship and sexual health decisions of young women in South Africa.

1 **Shaping my opinion:** filtering what I see in the community and forming an opinion based on my relationship goal

2 **Evolving habits:** sticking consistently to my choices without deliberation and adapting my routine as my life changes

3 **Reality check:** experiencing a reality check in my relationships changes my opinion and this change gives me comfort

4 **Re-evaluating partners:** forming new ways to deal with my partners, driven by my goal and my ability to cope

5 **Embedding habits:** trying to make new choices because I want to realign my relationships with my goals.

monogamous. This means that women are often caught in a dilemma of choosing to use condoms and create mistrust in their relationships – increasing the chances of HIV transmission.

Continued support

In the qualitative phase, segmentation was used to understand what motivates different young women, with segments linked to three key relationship goals based on lifestyle improvement, affirmation or gaining respect. Young women weigh up these goals against their perception of the relative risk of contracting HIV.

Interestingly, demographic factors such as age, income and location were not distinct behavioural differentiators. Therefore, gaining an in-depth understanding of the cultural relevance, influences, and social and emotional needs that affect future decisions was vital, as young women in these regions factor a number of often conflicting considerations when making choices.

This research only scratches the surface of South African young women's reality and the challenges to prevent HIV transmission. The decisions young women make are deliberate; they have agency. The programmes and applications developed as a result of this research should help them to make better decisions, but it is challenging, as it requires aligning with their relationship goals.

Young women in these regions may also need continued support, rather than one-off counselling, to help them better negotiate with their partners. Intervention must go beyond promoting preventative practices or product use.

Gaining an in-depth understanding of young women will result in more tailored programmes and appropriate messaging – making notable difference in the lives of these young women and future generations in South Africa.

Andrea Rademeyer is chief executive and founder of Ask Afrika

The overall HIV prevalence rate is approximately 13.1%

The estimated total number of people living with HIV increased from 4.25m in 2002 to 7.52m in 2018

An estimated 19% of adults aged 15-49 are HIV positive

Approximately one-fifth of women aged 15-49 are HIV positive

All stats for South Africa.

(Source: Statistics South Africa)

Augmented insights for growth

Two days of the MRS annual conference, Impact 2019, featured stars of the industry as well as authors, a politician and more, sharing their thoughts on all things research. Jane Bainbridge, Ben Bold, Katie McQuater **and** Catherine Turner **report**

Nicky Morgan MP on Brexit

The pro-EU Remainer Tory MP discussed Brexit, how she takes polling with a "pinch of salt", and Theresa May.

"The mistake was not to be honest with people about how complex withdrawing from EU membership would be," she said.

Morgan is a dyed-in-the-wool Tory, having joined the Conservative Party as a teenager in 1989. She was elected MP for Loughborough in the 2010 General Election, and held posts including Minister for Women and Equalities and Secretary of State for Education.

Asked about David Cameron, the man whose legacy is the aftermath of the Brexit referendum, she said: "The thing about [him] is how little he's talked about."

But she added that "a lot of people in the Cabinet at the time understood why he called the referendum and what he was trying to achieve by it", even if his intentions failed.

Morgan discussed her approach to research, which, by industry standards, would not be described as rigorous.

"Obviously, in terms of constituency, we send out surveys," she said. "And we do our own polling, which is not cheap. The point is that [our research] might be anecdotal, but as long as we're listening to wide range of people from every group, from every background, in every part of the constituency, then we do begin to build up a sense of what people think."

On Theresa May, she said: "I didn't back Theresa May in 2016 because I'm not in her Cabinet, and I've seen her in action."

She also despairs at the plethora of reporting focused mostly on those at the extremes of today's political discourse. But she sounded heartened by non-partisan politics, in particular her work with cross-party select committees, which she described as "politics at its best".

Tory MP Nicky Morgan takes polling with a "pinch of salt"

Author Andrew O'Hagan: "Research leads me to a place where I begin to care about the subject"

Author Andrew O'Hagan discussed how his non-fiction work often challenges "pre-narratives" in the media

The Scottish novelist and non-fiction writer is the author of books including *The Secret Life* and *Julian Assange: The Unauthorised Autobiography*, and editor at large of *Esquire* and *London Review of Books*. He regaled delegates with an array of insightful, comic and tragic tales, from his reporting of the Grenfell Tower fire to the time he spent shadowing Assange.

O'Hagan told of how in 2011 he got a call from a publisher that Wikileaks founder Assange wanted him to ghost-write his memoirs. As their relationship developed, Assange got cold feet and, although he apparently hankered for the publicity, it "bit into his idea of control" and he reneged on the publishing deal. "I'm a pursuer of simple truth," O'Hagan said. "And I couldn't get him to reveal his own truths."

His frontline, immersive approach to writing has put him in perilous and sometimes weird situations. He once took the name of a dead man from a gravestone in Southwark, an idea inspired by the practices of the Metropolitan Police, who used to steal dead children's identities to create aliases. Under the moniker Ronald Pinn, O'Hagan led an alternative life. "Because of the way the 'dark net' works, I was able to infiltrate its far reaches and buy drugs," he said. "I was always waiting to be arrested."

O'Hagan talked at length about how his non-fiction work often challenges the "pre-narratives" propounded by much of the media. It's a journalistic practice he said was exemplified in the press's coverage of the Grenfell Tower disaster. O'Hagan wrote extensively about the fire from a perspective at odds with the narrative told by the mainstream press.

"It's your job as a journalist to resist these accepted truths until you can prove them with evidence," he said. "Accusations are as powerful as evidence now because the internet promulgates information as if it's fact."

The church should forget thinking like a brand and focus less on getting young people through its doors, according to the Reverend Richard Coles

Coles also talked about sexuality and celebrity, pop, politics and youth engagement in a wide-ranging discussion with Alison Camps, deputy chairman, Quadrangle.

Camps said Coles had the "ultimate portfolio career", highlighting his BBC broadcasting duties, his stints on celebrity shows, his time as an 80s popstar in both Bronski Beat and The Communards, as well as his vocation of parish priest.

Coles said he did not think the Church of England was a brand. But he added there was a temptation to "make sure we give the right kind of message" to address the haemorrhaging of numbers.

"Someone said we needed a mission statement," he said. "But what we do is so different to our [wider] culture values. We have problems, and I kind of like that. I like that we're seen as hopeless and bumble around; that we're not afraid of failure.

"Mary Magdalene went to the graveyard expecting a body in the tomb, but found a life transformed. That's really what we're for, and I don't think that that is something we can easily articulate."

In a similar vein, he cautioned against a drive to bring more young people into the church. Instead, they should go out and live life to the full – the church would be there for them later, as it was for him.

An avid Twitter user, he believes social media is both addictive and tends towards the extremes of opinion rather than the middle ground, and suggests that etiquette online, or an ethical framework, has lagged behind the technology supporting it.

The Rev Richard Coles says the church will be there for young people later in life

Augmented reality (AR) is a boon for researchers, giving them "another way of measuring things" – Jennie Roper, head of insight at out-of-home specialist Kinetic

Jennie Roper described how AR can be used cost-effectively

Roper was talking during a panel session hosted by Dr Alastair Goode, cognitive scientist at Gorilla In The Room, in which she shared her views about the ramifications of augmented reality for outdoor advertising.

"We are the older place-based medium and mobile is the newest place-based medium," she said. "Mobile really impacted on our business. But we can use mobile now to amplify our medium, through geo-targeting, when consumers might get a signal walking past a poster."

Roper pointed out that for researchers, while real-world experimentation can be expensive, AR enabled them to A-B test an advertising billboard "quite cheaply".

The conference session also looked at some of the ways that augmented reality has popular applications. Greg Ivanov, head of AR/VR/Lens partnerships (EMEA) at Google, talked about how the tech giant is developing immersive tech.

Ivanov envisaged a future where people are no longer staring at their mobile touchscreens but are looking at the world through a device that overlays their vision with information about the world around them.

The apogee of AR will be when people no longer have to reach into their pockets for their smart device. "The way of thinking of this is having a superpower," Ivanov said.

Dr Carl Smith, director of the Learning Technology Research Centre at Ravensbourne University, outlined some of the applications of "extended reality", the "umbrella term meant to simplify all immersive technologies".

He gave an array of examples, from tech that can "slow time in real time and allow us to see patterns we don't usually see", to enabling consumers to put their tongue on their mobile device to taste their meal before they go to a restaurant.

The geeks have inherited the earth

Victoria Coren Mitchell, TV presenter, poker champion and columnist, talked about geeks, politicians and performing.

She described contestants on the famously geeky *Only Connect* as "people of such rarefied intelligence and perspicacity" who care more about their enjoyment of facts and words than "what jumper they're wearing".

However, she took issue with terms like "nerd" and "dork", arguing that "the preferred term is 'geek'".

Coren Mitchell worked with Tory MP Michael Gove at the *Sunday Times*. "He was a quizzer. I think he's very smart – he's the only person who ever beat me in a spelling competition.

"But I was disappointed about the remarks he made about people [having had enough of] experts and that he played to a lower common denominator."

Coren is a prolific tweeter, which means she inevitably attracts the ire of trolls. But she is resolutely unconcerned about them.

"I've been trolled a bit, but not that much as I don't say anything that contentious. A stranger writing horrible things doesn't really bother me. It's like graffiti."

Asked what she would commission the market research industry to find out for her, Coren Mitchell said: "I'd like to know what it is that makes people so quick to communicate when they don't like something. Do people who don't like something really not like something, or do they just like the sound of saying they don't?"

Prolific tweeter Victoria Coren Mitchell is unconcerned with online trolls

Think like hackers said Carl Miller, author of *The Death of the Gods*

Miller, research director at thinktank Demos' Centre for the Analysis of Social Media (CASM), said the public should be thinking about opsec – operational security, the process of determining whether you could be undermined by your online activities.

During a panel session, Miller, the session's keynote speaker, and cybercrime and information experts discussed the implications of power shifting due to the impact of technology.

Some of the key takeaways from the session were:

Big problems require cross-border partnerships

For his book, Miller accompanied police to a cybercrime raid. The only surprise about this experience, he said, was that the perpetrator was caught. Often the perpetrators are in one country, the victims in another and the police cybercrime teams across countries can't reach across borders.

Governments and regulators are lagging far behind…

Chris Monteiro, cybercrime researcher, compared today's data-driven economy to fossil fuels. "It's a very quick, efficient way of kick-starting the economy, and it's having long-term effects we didn't previously consider."

…But regulation may restrict freedom of expression

Tighter regulation means governments have the potential to take more control over expression and freedom of speech, according to Jodie Ginsberg, chief executive of the Index on Censorship. This is particularly problematic when deliberating the question of what constitutes harm, she said. "We have to be careful what we wish for – the narrative is that the internet is a pit of porn and abuse, and that conveniently allows governments to have control of what can and can't be said." People tend to fall into the trap of thinking problematic content can be easily identified, she added. "We think that regulation would only get rid of the nasty stuff, but it's almost impossible to define it without expression of opinion falling under the definition of what's harmful."

The panel discussed small changes affecting their businesses

Three case studies in nudging behaviour for social change

Hate crime

The Scottish government had to deal with an increase in hate crimes – last year, more than 5,300 cases of hate crime were reported in Scotland. It had to overcome some suspicion around curbing free speech and that any campaign would trivialise the issue.

Claire Prentice, head of safer and greener marketing at the Scottish government, said the target for its most recent campaign was bystanders as well as victims. It went for creative that "called out haters for what they were" in letter form to give a personal and emotional connection and a sense of collective responsibility.

The campaign reached more than two million people, and social media reaction was excellent: a 10 percentage-point increase in understanding of what hate crime was and a six percentage-point increase in those who would report it online if they saw a hate crime.

Student wellbeing at university

Student mental health is a huge issue for student community business The Student Room. In a climate of worrying increases in suicide and self-harm among the university population, it developed a real-time continuous improvement app – Enlitened – as a new way of helping students improve wellbeing.

Both market research and academic research were used to develop the app, which includes reward-based incentives. Julie Vincent, insight director, TSR, said: "Students understood surveys and had low expectations of them, so we had to stop talking about surveys."

The crucial part of the app was that students wanted to be heard but also see what happened as a result of their feedback, which was built into the app. Three universities are currently piloting Enlitened, with two more ready to start.

Paying for *The Big Issue*

The Big Issue is well established as a magazine and a self-help route for homeless people to gain new opportunities. But 20% of people give money without taking the magazine, which undermines the behavioural mission of *The Big Issue*, by losing the transaction element.

The company worked with The Behavioural Architects (TBA) to look at the barriers; they were limited by the fact that they didn't have control over many variables – in particular, neither the buyers nor the sellers.

TBA identified three nudges: to push the transaction element with large stickers on sellers' vests showing the price; increase the salience of the content by going back to the sellers making call outs; and re-educating people, often using third spaces. There has been a 46% increase in sales since these nudges have been introduced.

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Discussing democracy

Demos CEO Polly Mackenzie **thinks Britain is in a mess, but she also believes we can fix it with insight, discussion and debate. She tells Jane Simms how**

Original photography by Will Amlot

"I'm leaving Brexit for others to deal with," says Polly Mackenzie, chief executive of the cross-party think-tank Demos. Politicians are "unbelievably preoccupied by Brexit... and it's worrying how many important issues are being sidelined". She doesn't want to fall into the same trap: "I want to work on the rest of the stuff."

Mackenzie has been described as having 'a brain like two planets'. A regular face on current affairs programmes such as *Newsnight* and *Question Time*, she skewers what she sees as the simplistic arguments of politicians from both sides – Jacob Rees-Mogg and Ian Lavery being just two. She enjoys these platforms, but finds the politicians depressing: "Their simple, 10-word answers can be very effective in hiding the truth and complexity of real life. But it's the job of those of us who disagree to explain our ideas in a compelling way."

A Cambridge graduate who used to write about housing policy for *Property Week*, Mackenzie went into politics "temporarily" to help her make the transition from business to political journalism. "But I found I valued taking action, not just writing about things, so I stayed." Recent Demos reports on issues ranging from trust in a digital age to the concerns of Britain's rising numbers of self-employed are testimony to this purview. But as a former policy adviser to Nick Clegg – before and during his time as deputy prime minister in the coalition government – and a passionate advocate of engaging with citizens to inform and drive policy, Mackenzie is brimming with views on why the country is in the mess it's in, and what it will take to get us out of it.

"Because you can now micro-target people digitally, you can offer them any Brexit they want – but you can't deliver it"

Arrogance, complacency and a woeful lack of understanding of citizens was at the root of the vote to leave the EU. "The referendum was driven by politics, not insight," she says. "David Cameron thought he would win, and believed it was a way to heal Conservative party divisions. Well, that's worked well, hasn't it?"

While a lot of politicians were out of touch with just how frustrated and angry people felt in some parts of the country, Mackenzie thinks the tactic of frightening the public with what would happen if we left the EU was ill-advised. "Now, very realistic warnings about what would happen in the event of a no-deal Brexit are discounted, because people already have this logic of 'project fear' in their heads. Like 'fake news', it inoculates people against paying attention to those warnings."

There is also an intrinsic problem with putting complex issues into referenda, particularly in an era when political communications have undergone a sea change. "Because you can now micro-target people digitally, you can offer them any Brexit they want – but you can't deliver it," Mackenzie says. "We have been over-promised on democracy. You can go to the supermarket and get what you want, but in a democracy, you get what people collectively decide – and, for most people, that's not what they want; it's a compromise."

As in the consumer world, brands that over-promise and under-deliver are penalised – hence the current widespread disaffection among voters of all hues. This was the subject of a paper Demos produced for the Information Commissioner's Office, which concluded, unsurprisingly, that there needs to be more effective regulation of political advertising. "If I were to do an ad that said this herbal treatment will cure cancer, it could be taken down, because it is demonstrably not true," says Mackenzie. "There is no mechanism for doing that in political advertising."

Extreme views

While 'the truth' in politics is more subjective than in consumer goods, "in political campaigns up and down the country, lies are put out there, and there is no recourse".

Mackenzie is interested in the growing partisanship in politics, influenced by social media. "It is now possible to threaten to kill a politician directly, in a way that it wasn't previously – though people might have been saying it in the pub before." The reward mechanisms of social platforms foster the tendency to express extreme views, she adds. "When you say something extreme, it is more likely to be shared, which offers people this kind of endorphin kick." This encourages more extreme political views, with fewer people than ever likely to describe themselves as centrists, says Mackenzie.

What does she think of Clegg's decision to join Facebook, as its head of global affairs and communications? "I think it's the right choice for Facebook, and an opportunity for Nick to make a huge difference if the company really does change in the ways it should. We are increasingly asking our large tech companies to take decisions that would have been the preserve of nation states, so it makes sense for them to turn to people with experience leading countries."

The new political divisions are determined more by age than by class or traditional party affiliation. Overwhelmingly focused on their own internal politics, however, the parties – at least until the recent defection of a number of Labour and Tory MPs – don't seem to be listening to what citizens want. Are they listening to Demos?

"I'd like to think so," says Mackenzie. "Politicians lack two important things: time and freedom. A role that think-tanks play is to have the time to think big ideas about where the country is going."

Rebuilding legitimacy and belonging

The big idea Demos is focusing on is how to rebuild legitimacy and purpose for public institutions – including government – through listening and engagement. Mackenzie believes right and left are united in "quite a dark view of human nature".

"There is a sort of centrist view that you can't go around asking people what they think because they're all a bunch of low-minded, racist nationalists who need to be told what's good for them. Then you have a bunch of populists who think that people have terrible instincts, but that we should pander to them – that we should punitively tax the rich and chuck out the immigrants. I'm exaggerating for effect, of course."

Her experience at Demos, however, is that by speaking to people patiently and deliberatively, they are able to navigate the complexities of political decisions.

This insight is manifested in two recent pieces of Demos research on nostalgia and optimism. The appeal of 'a glorious past' has been prominent in European and US politics in recent years, playing to those who have felt so alienated by economic, social and cultural change that they are unwilling – or even unable – to look to the future.

"Vince Cable was, I think, rightly criticised for his phrase that people are nostalgic for a time when faces were white," says Mackenzie. "People are nostalgic for a time and – at that time – most faces happened to be white." What the research showed was that people were actually nostalgic for "a time of working men's clubs and neighbours sharing their eggs" – for a sense of place, community and belonging.

Apologising for using a "terribly pretentious and think-tanky word," she believes the way to preserve the best of the past while moving forward and rebuilding legitimacy in institutions is to be

Mackenzie finds politicians depressing

'iconoplastic'. "Things need to be radically transformed, but that's not the same as smashing them to pieces," she says.

Mackenzie's proposal to relocate parliament to Manchester is a case in point. "Yes, parliament has always been in Westminster, but it's changed – and, for all the rhetorical nonsense about 'the mother of parliaments', we've had proper democracy here for less than 100 years."

Moving parliament would help to address the problem of distance, disengagement and disconnection that people in the rest of the country feel from London. It would also offer the

Moving parliament to Manchester would 'press the reset button'

chance, she believes, to "press the reset button" on politics and the economy.

Forging a new national identity

Mackenzie and her team started to ask what it would take to cut through the outrage and intolerance – much of it driven by gloom about our prospects – and restore a sense of national optimism. The intention wasn't to gloss over difficulties, but to acknowledge them and find a way of coming together in common cause.

The first wave of the Optimism Project, for which Demos partnered with Opinium, polled more than 2,000 UK adults and found people were more optimistic on a local than a national level. Free healthcare, education and our heritage were the things most valued about Britain, with diversity also ranking highly. What depressed participants most was political disagreement – 76% wanted to see politicians of different parties collaborating more to solve issues.

"There aren't many policy problems that aren't helpfully informed by a deep conversation with the people at the 'pointy end' of it," says Mackenzie. It's obvious, for example, that Universal Credit would be working much better if it had been deeply informed by an understanding of claimants and their lives.

"There aren't many policy problems that aren't helpfully informed by a conversation with the people at the 'pointy end' of it"

University tuition fees are another example. While great policy from an economic point of view, "something emotionally doesn't work – and young people feel very burdened by the idea of £50,000 of debt. So, politically, it is a disaster."

Engaging citizens in decisions

The way to give people back a sense of agency is not with referenda, which force binary decisions on complicated issues, but by bringing people together to think through the trade-offs that need to be made and come to joint decisions, Mackenzie believes.

She cites citizens' juries – such as the Citizens' Assembly on the future of social care convened by Totnes MP Sarah Wollaston last year – as a good example of how to do this. While the recommendations made were not the most progressive, she says, they – and the process – have some legitimacy.

So was Michael Gove right in his judgement, during the 2016 referendum campaign, that Britons have 'had enough of experts'? "I am not ready to give up on the enlightenment values of evidence gathering and the idea that there is, in most spheres of

Mackenzie has been described as having a 'brain like two planets'

human knowledge, something that we might call 'truth'," says Mackenzie. "I believe experts should very often be listened to – but it can be hard for people to absorb evidence when it feels disconnected from their personal experience. People's day-to-day life is informed by narrative and emotion. If you just rely on experts to come up with 'the best system' and then go and tell people about it without taking them through a process, they'll be pissed off."

"It can be hard for people to absorb evidence disconnected from their experience. Day-to-day life is informed by narrative and emotion"

It's a lesson she learned after leaving government in 2015, when she accepted personal finance journalist Martin Lewis's invitation to set up and run the Money and Mental Health Policy Institute, a charity working to break the link between financial difficulty and mental health problems. She learned a lot more from this direct engagement with people than she ever did "looking down on services from above".

Mackenzie doesn't wear her intelligence lightly, which makes her quite difficult to interview. A common response to my questions is to reframe them: "I think the question is...." She certainly gets her ideas across in a compelling way, but she reminds me of a politician herself, determined to communicate her own agenda. She admits her main weakness is impatience – which might explain why she doesn't fancy going into politics. Also, she says: "I have a young family, and frontline politics sucks too much out of you."

Arguably, Mackenzie can have more impact in her current role than she could in politics. She is driven by trying to find better ways to do things. "I like designing creative solutions to problems; I hope, sometimes, I can help make change."

Her nine years working for Nick Clegg taught her "you can make more of a difference in an hour [when you're in power] than you can in a decade in opposition".

Mackenzie joined Demos in January 2018 because she wanted to be part of an organisation that "understands change". She believes the think-tank's emphasis on understanding people's 'lived experiences' is becoming ever more critical, "because when people are frightened and feel they are not being listened to, they will go to the extremes".

She is optimistic, however. In a recent comment piece in London's *Evening Standard*, she launched a rallying cry to swap despair about UK politics for positive action: "Brexit will probably be a disaster for Britain. Let's not compound it by giving up on everything else."

We can rest assured that Demos will be leading the charge. As Mackenzie says: "We are just unbelievably interested in people."

Listen and learn

When businesses carry out 'voice of the customer' programmes, the questions they ask must be carefully considered. It's not about getting the answers a business wants, it's about getting the answers it needs.

By Tim Phillips

When Rosemary Hadden, head of research and insight, joined npower six years ago, the company propped up the *Which?* annual survey of customer satisfaction for utility companies. "We were bottom of the pack – and by quite some way," she recalls.

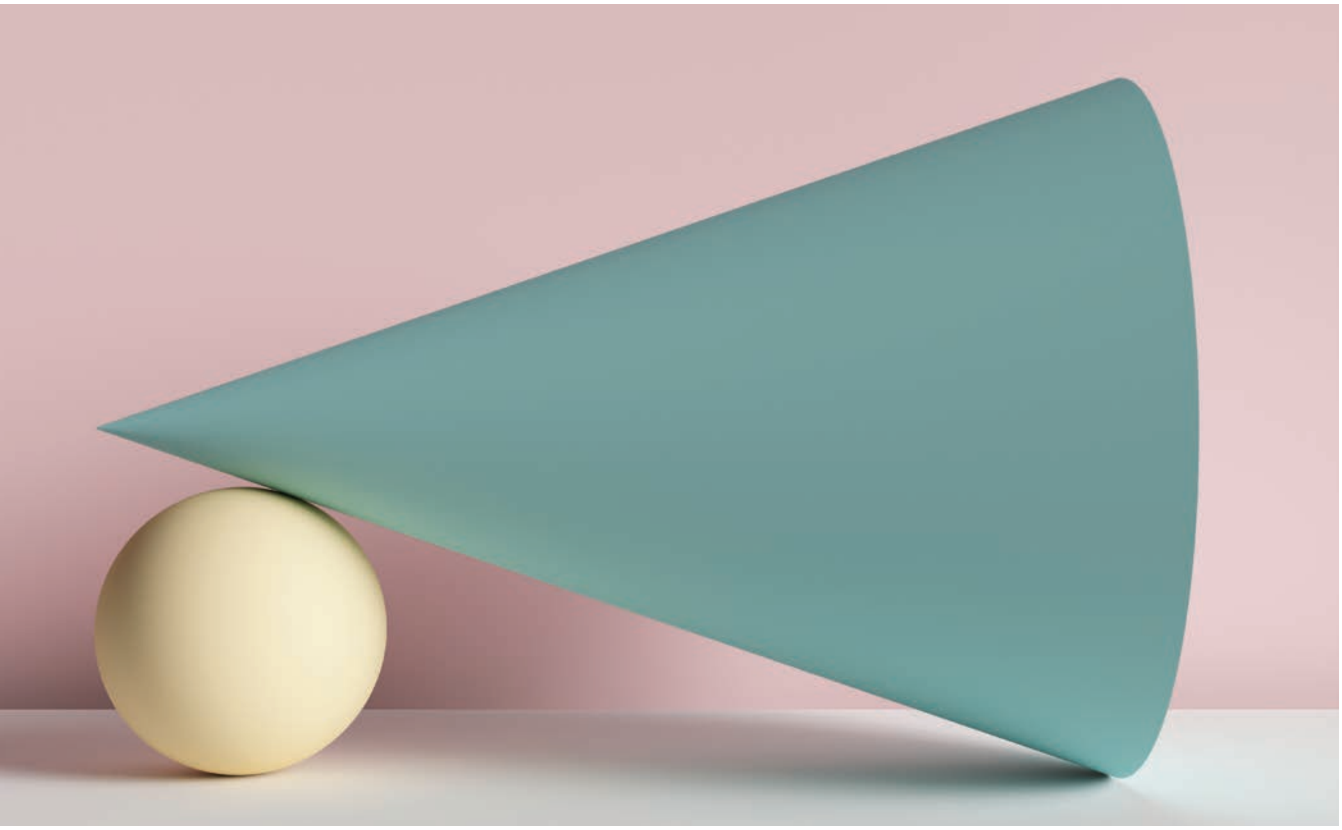
A programme to improve the customer experience was in place, but its results were hard to understand because – as Hadden describes it – "the view was nearly everything was broken".

Listening to the voice of the customer (VoC) for a company in npower's situation is messy and challenging. "In the energy sector, everything you measure is interrelated," Hadden says. "All of the touchpoints influence one another, so it's important – from a voice of the customer perspective – to look at the way you analyse and interpret the data, rather than do it in silos." For example, unhappiness with price affected the rating for customer experience. When bills went up across the industry, negative sentiment on social media would spike – and, for some customers, this was about their bills. In the 2018 *Which?* survey, 58% of former customers said price was among their top three reasons for switching – while, for some, it was media criticism of npower as one of the most recognisable 'big six' suppliers.

Indicators in different parts of the business also sometimes pointed in different directions. So while post-contact surveys sent through email and text message were positive about the performance of npower's contact centres and webchat service, its relationship surveys showed customer service was consistently rated as poor.

The last time *Impact* reported on the voice of the customer in 2017, we focused on what we called 'the multichannel, always-on, technology-driven world of much customer experience research' that technology platforms could provide. While the potential to analyse and act on large volumes of customer data has increased dramatically, the challenge for many users is to create VoC programmes that take us beyond the dashboard – that give insight into why customers respond the way they do, and what can be done about it. Productised, automated tech-driven VoC platforms may help many organisations, but companies such as npower – with complex, multilayered challenges – risk neither diagnosing the problem nor solving it adequately.

"I would describe a lot of VoC platforms as a kind of customer-centricity theatre," says Felix Koch, regional CEO, EMEA and APAC, of C Space. "It allows heads of insight or CMOs to say 'of course we are listening to the customer all the time. We have 24/7, always-on dashboards'."



Susanne O'Gorman, global head of customer experience at Kantar Insights, adds: "Our clients struggle with three aspects of monitoring VoC. The first is how to make sense of all this information and data they are gathering. Very often, they have KPI systems that are not aligned with the data. Second, how do they turn this into something actionable and, third, how can they understand what the return is on this investment? Each is a huge challenge."

So how do organisations with complex needs and a desire to improve, such as npower, get beyond the dashboard? Mark Barrett – a managing director of Watermelon Research, which created npower's VoC programme – says: "You can collect the number and the feedback, but it's what you do with it – how you choose to fix it, what you expect to happen, and how you offset the costs – that matters. Some companies are measuring a number rather than starting with the issue."

"You can collect the number and the feedback, but it's what you do with it that matters"

O'Gorman agrees that this is an essential first step, and says meeting those challenges is primarily about careful design – and using the appropriate methods to collect, analyse and act on data – not the data itself. "First you need buy-in from the organisation," she adds. "What are the needs of the stakeholders? What are their information needs? How are they going to act on it?"

The way Hadden's team resolved its contradictory indicators shows why a business governance plan is essential. "We did a deep dive with individual customers and started to realise they'd had to contact us multiple times because the problem hadn't been sorted," she explains. "So each transaction in the call centre tended to leave the customer happy at the point the post-contact survey was conducted, only for that emotion to evaporate when the operational side of the business did not fulfil the promises made by customer service. The (non-trivial) solution to the problem lay in a completely different part of the business."

Demonstrating how accountability spans the organisation, Watermelon and npower have found that automated sentiment analysis can be more complex than it appears. "Social media data is used to generate complaints, or public review sites tend to be people looking for a way to complain. This has a value, but it's perhaps not the best way to drive strategy," Barrett explains.

His colleague, Sian Kerr, also a managing director of Watermelon Research, explains that one of the ways the company has been able to help is by creating econometric modelling of different VoC input data in real, or near real, time. So while there are multiple drivers of a metric such as customer satisfaction, what matters for response is their relative influence.

Factor analysis shows that the strong negative sentiment towards npower when prices change is a combination of a transient media-driven effect and an underlying price effect. "We instantly see spikes in social media with negative reactions," Kerr says. "When the Customer Satisfaction Score (CSAT) drops, we can understand how much is driven by their reaction to negative press, compared with the actual customer experience."

This means Hadden has more clarity in her reports to npower managers. "Whenever I go to the leadership team, I make sure I know what caused the scores to go in a particular way. I'm not just going in there to say the scores have gone up or down, with no idea what might have influenced it," she says.

In 2018, for the first time since *Which?* performed its annual survey, npower was not at the bottom of the table. While it has a long way to go to match the ratings of the smaller companies at the top, it no longer lags behind other large suppliers. *Which?* was grudgingly supportive: "The foundation for improvement has been there for a while. Our evaluation of npower's procedures and practices, including on product management and customer service, has found it to be well above average for three years running."

Collecting data

Watermelon's approach to VoC stresses the heterogeneity of customers, as well as of challenges and clients. Importantly, this means its VoC platforms may make use of old-school forms of collecting data, such as CATI or face-to-face, because it has found it is important that the way data is collected matches customer experience. "Do what is appropriate and relevant to reach the customer, not just what you can do on the platform," Barrett recommends. "Mirror the channel through which they deal with you."

Real-time feedback is exciting, but not every piece of analysis on the dashboard needs this attribute. And while many VoC platforms stress automation, Watermelon has invested in maintaining its capability in analytics and techniques such as CATI, which it uses to generate insight for clients and other research agencies that are trying to deepen their VoC ability.

Who is the B2B customer?

In the consumer world, measuring the voice of the customer is straightforward, because it is the customer who makes the purchase or uses the service. In the B2B world, it is not always so easy, as the internal buyer or procurement department often does not make decisions in isolation. Many B2B marketers are starting to listen more to the people in the company who use the products they sell – not just the ones who sign the cheques – realising that they often have a significant (if informal) influence on how the product is bought or used.

When she joined SAP as chief marketing officer, Alicia Tillman realised the business was "at a crossroads". The brand was all about technology, so had limited communication with, or knowledge of, the people on the front line who used it every day. "I'm no longer marketing just to the decision-maker," Tillman says. "The end users will tell us what they need to be successful. So our method has to become more consumer-like, because technology has given people a voice. Every company talks about voice of customer, but now every role within our company is focused on finding that voice."

This also means reorienting the company to interview and survey its users – not just rely on operational data – and to make rapid product updates based on the feedback.

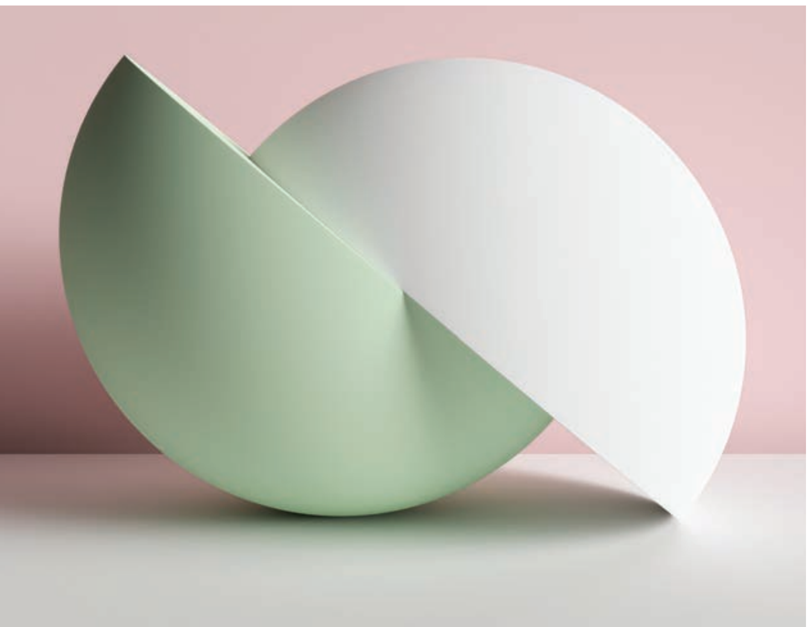
"There has been a tremendous push towards data, but if we believe that the only way to make a decision is based on the data, we will not win the hearts and minds of our customers," Tillman adds.

One of the related pitfalls of data-driven VoC programmes is that they may tempt businesses to obsess on local, transactional peaks and troughs at the cost of insight into a bigger picture. Charlotte May, head of group customer research at Legal & General, has been running its VoC research for four years, during which time she has concentrated on building a longitudinal model of how customers view the company. "There was a real need for it to become much more of a barometer of how our customers were thinking and feeling, so we could use that to help shape and inform far more constructive actions," she says. "The analogy is, you could use a camera and take some really beautiful pictures of the scenery, but if you have a film camera, you can get a view of the nuances in the weather. You get much richer detail when you look longitudinally."

Balancing reactions

Looking only at the snapshot view can lead to over-reaction to events, May says, but also under-reaction to important trends. It's hard not to react to a seasonal spike in the data, or two inflammatory comments in a post-contact survey, but that might not be the best course of action – taking a longer view might show up more important insights. "Potentially, those might be the only two comments you'll ever get in that one area, in two years. Whereas something that's not as provocative could have a much more positive or negative impact on your overall customer performance," May explains.

An example is the analysis of Net Promoter Score (NPS) data. While low scores are potentially a cue to act, those in the neutral zone can also create insight into how to improve the business – although, in many NPS surveys, customers giving a mid-range rating are not asked why. "We flip the question round and get them to tell us what would have made the experience a nine or a 10," says May. "By understanding what would have taken it from good to great, that's really helpful, because you'll often get a very different type of insight into your customers."



Another reason to take a cautious view of what the dashboard tells us is that valuable insight is scarce for many companies – though that's sometimes not obvious watching metrics bouncing up and down. This is even the case with transaction data, argues Clive Humby, formerly of dunnhumby, where he was a pioneer of informing VoC programmes through data analytics using Tesco Clubcard. Now he is the chief data scientist at Starcount. He points out that most consumers think about brands rarely, and without a strong opinion either way. So, as with Hadden's call centre ratings, we should be sceptical about attributing meaning to the data we collect during the transaction or at infrequent touchpoints.

"We were really lucky when we worked in grocery, because you buy so much in a grocery store that your transactional data is very valuable," says Humby. "It tells us all the basics about your ability to cook, whether you've got a family, whether you're economical or treat yourself. Virtually every other business in the world isn't like that; you'll be lucky if you get 12 transactions a year. So what does that say about customers? Not a lot."

The challenge is to hear a customer's voice during the huge part of their lives when they are not transacting with you, or even thinking about your brand. This contextual information is often ignored in VoC platforms, but is a factor in many metrics. This type of outside-the-customer-experience listening is, by definition, not explicitly captured in much VoC data, but does drive the numbers.

For example, an energy supplier suffering from strong negative sentiment after a price rise may not find that business suffers, because every other supplier feels the same effect.

"I would argue that the most important aspect of a customer that anyone needs to understand is, are we part of their consideration set – and, if we are, how big is that consideration set?" Humby says. "It's almost a share of wallet measure. There are early indications we might get something in that space from people such as Mastercard and Visa; they won't give you personal data, but they will give you patterns."

Social data – the focus of much of Starcount's activity – is one way to deepen that non-transactional insight. Social listening is a valuable way to hear about an emerging customer problem or event to track individual complaints, but it has a negative bias (you don't tend to care much about a brand until it annoys

Feefo feedback

"It started out that we just helped people collect reviews for their brand," says Neil Mcilroy, head of product innovation at Feefo. "But our product has evolved; now clients are using it to interrogate verbatim responses that they collect from customers as well."

Nothing shows the voice of the customer in its rawest form than online review sites, but the problem of fake reviews has made some of these tools unreliable as a basis for VoC analysis – and it is hard to act on reviews unless you know something about the reviewer. Feefo claims to avoid the fakeness problem by ensuring that reviewers are validated customers, and by preventing clients from cherry-picking who is invited to review or whether those reviews are displayed.

It is also expanding its offering. "We now deliver campaign management tools and reporting tools, which help measure that customer life-cycle and journey that they're providing for their customers," Mcilroy says. This means giving scripts to the client to integrate Feefo's tools with its transactional data.

To use the reporting tools, Feefo captures details of the transaction – for example, whether it was online or offline – or customer profile data to allow them to target campaigns. Now you're as likely to get a request from Feefo to give the retailer you purchased from an NPS as a review. Customers such as Iceland are using this information to estimate the RoI of improvements to service.

It has also been building sentiment analysis tools to examine the reviews it has collected. "The product – up until the past 18 months or so – was a lot of numbers, benchmarking, performance reports, but all very quantitative. What we've tried to do is take all that qualitative feedback they collect on a case-by-case basis from customers and give them the tools to take action and get insights from that information at scale," Mcilroy says.

you) and a tendency towards groupthink. Starcount, instead, has identified a way to hear the customer's voice by looking at the things that groups of customers like or follow precisely when they are not interacting with the brand. "On its own, social is not the answer, but aligned to the transactions you have – perhaps to market research, perhaps to other third-party data, such as traditional geo-demographics – it helps you understand where you're winning and where you're losing," Humby explains.

Business value

Aligning VoC platforms to business needs and creating effective plans to act on what they tell us are both complex – but evaluating whether that has created value for the business can be even harder. Hadden's insight that "everything you measure is interrelated" is common to many types of research. At Watermelon, Kerr argues that regression analysis in real time can reveal the largest influences on customer experience. The same analysis can also uncover the likely effect of improving individual metrics. It is, she says, an essential starting point for the root-cause analysis that decision-makers need when presented with customer problems or opportunities, suggesting both a course of action and the likely return.

At least at the beginning, when there are many improvements that can be made to customer

experience, it may be more practical to target project-based discrete “wins”, says Kantar’s O’Gorman. That means designing a business goal that can be captured in data and explained to people in the business who will make it happen. “The ability to resolve a customer service issue with the first call is one of the most effective drivers of customer satisfaction and loyalty, for example – and you can say ‘these are the actions using the programme that we know will help us to improve first-call resolution’. Then you can estimate what this means in terms of putting dollars against the investment.”

Creating discrete campaign-driven improvements to the customer’s experience is also the thinking behind the VoC programmes that Feefo, a public review site, is beginning to run with its clients (see panel, left). This can also be tackled, says Kerr, by making sure that VoC platforms deliver only relevant information to each part of the business. While call centres can focus on driving metrics known to influence business performance, decision-makers in other parts of the business may get more long-term, top-level information. On this scale, Watermelon clients can interactively and collaboratively build action plans on the platform.

First-hand knowledge

On 3 January 2017, Mark Zuckerberg posted a blog on Facebook saying: “My personal challenge for 2017

is to have visited and met people in every state in the US by the end of the year." The road trip predictably earned a lot of media coverage for Zuckerberg's "deep reflection" about the role of Facebook in ordinary people's lives, and there always seemed to be a photographer to record it. He got to do many things that Silicon Valley billionaires usually don't do, such as drive a tractor and eat jello. The tacit admission is that Facebook's CEO, who was a billionaire in his early 20s, had oodles of real-time and longitudinal data about the voices of ordinary people – more data than any CEO in history – but he had almost no first-hand experience of the lives they led.

Some researchers claim that experience of these first-hand customer voices is essential for making VoC relevant to the business. At C Space, Koch says organisations should always supplement their data with personal interaction – and that doesn't mean observing customers from behind a two-way mirror. The danger of data-driven platforms, he warns, is the implication that face-to-face interaction is now optional. "Managers can say, 'we don't have to meet customers, we don't have to do the messy thing of speaking to them, because we know what they feel and we know what they like'."

"Do what is appropriate and relevant to reach the customer... Mirror the channel through which they deal with you"

C Space listens to the voice of the customers by immersion programmes, taking executives to eat in their own restaurants and browse in their own shops, often places they rarely visit. "It's very human to want to retreat to an area where you are not confronted with difficult news and difficult conversations, because this is about being faced with something that's broken about your company," Koch explains. C Space also uses a 'buddy system', an app that creates a one-to-one relationship with a customer to message throughout the day – in Koch's words, "injecting some humanity into a process that is devoid of emotion".

Injecting humanity can also inform managers about customer priorities and irritations that they never considered as relevant. "We're seeing a lack of empathy," says Craig Scott, founder and CEO of Mingle. Inspired by the example of legendary P&G CEO AG Lafley, who insisted on a customer visit in every location, Mingle will work with a small group of managers to meet users one to one – in their homes, their workplaces, or even, in one case, at a beer festival. The brief is to find a real-life response to the important questions that they need to investigate. "A spreadsheet doesn't tell you that. Big data doesn't tell you that. Epos

doesn't tell you that. You have to see it with your own eyes," Scott says.

He explains that data creates what psychologists call 'effective empathy' – a way of evaluating the voice of the customer while still keeping them at arm's length. "But if you get out of the office and see for yourself, you learn in a way that's called 'cognitive empathy', which is far more long lasting."

Their experiences are fed back in a workshop, and this becomes the spark for new learning that Scott calls the "Mingle tingle". This tingle could be to use a new insight into 'why' (a kitchen appliance client was surprised to find that its customers were shoving their appliances into cupboards, because kitchen gadgets are universally regarded as ugly), or simply to understand context to help them decipher the data.

The idea is not to replace quant-based VoC data, Scott says, but to inspire and supplement it. In an era when many executives are more at home with data than people, the voice of a real-life customer can be both effective and intimidating. "One managing director had addressed the Stock Exchange two weeks before we met," Scott adds, "but he was terrified to meet a housewife in Hull."

A force for change by Watermelon

A common problem we see with organisations that have implemented a voice of the customer programme is that they can quickly become a report on 'business as usual'. It ceases to be a force for change, with employees feeling the programme is giving no new insights they can learn from or use.

It's vital to engage employees and communicate the rationale and aim of the programme. To effectively embed it and gain commercial benefit, employees must believe in – and continually use – the programme.

So it's important to build an evolution plan into the implementation and design phases to address current business needs, as well as being flexible in longer-term objectives. Input and resource is required to expand the programme so it not only continues to change with the business, but also shapes tactical and strategic planning.

At Watermelon, we recommend the following steps:

- Support the rollout of a programme with a detailed and phased approach to engagement. Don't try to launch too much too soon. This can be overwhelming and confusing for colleagues who are unfamiliar with the data and tools at their disposal
- Don't just leave it in place and let it tick over. Schedule performance reviews of VoC to challenge whether new measures, touchpoints and channels need to be added, or others changed or dropped. Map the changes required and be sure everyone is aware of the plan and is working towards it
- When re-scoping, focus on innovating rather than just more numbers – whether that is how you are engaging with customers to capture data, or how data is shared and visualised across the business
- Communicate the benefits of VoC to the business and customers: 'This is what we have been told, these are the steps put in place to address it, and this is the change you can expect to see.' This way, you ensure colleagues continue to be invested in the programme and customers see the value in responding
- It is important to track key metrics, but always look for the drivers behind this and any emerging items. Text analytics can be a powerful tool in discovering where new issues and opportunities lie
- Any VoC programme should help to uncover root causes of problems and service improvements, but make sure there is a positive, developmental aspect, too. Sharing best practice and learnings across teams and departments helps to develop colleagues, promote collaboration and improve the business.

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Pushing the limit

Under Bernie Ecclestone, market research didn't exist as far as Formula One was concerned. But with new ownership, Matt Roberts and his team were given the remit to change that. By Jane Bainbridge

It's many people's dream work scenario – being made global director with the opportunity to build your team from scratch. No need to put up with irritating legacies, be they team members or badly crafted trackers. Oh, and throw in a glamorous sport, with celebrities, travel and massive reach, and you've got a rather heady mix. But this is exactly what was offered to Matt Roberts when he was appointed global research director for Formula One (F1).

It's not hard to see why he was approached for the role: Roberts had almost ideal experience, combining media and sports. First entering the world of market research on the Millward Brown graduate scheme – via several ad sales researcher roles, ESPN, Eurosport and BT Sport – he ended up at Sky Sports. "I didn't intend to leave Sky, because I enjoyed working there, but then F1 came calling. My brand research, coupled with knowledge of how TV audiences and commercial works, fit together – it's ended up being the perfect job," says Roberts.

Although he describes himself as a big sports fan and a keen runner, F1 wasn't particularly on his radar. "I've always kept an eye on what's going on without necessarily watching lots. But nothing really could have prepared me for understanding how the sport works from within," he explains.

How it works is multifarious and political, as I discovered when preparing for this interview. This is partly because there are so many businesses involved, at different ends of the sport, and often with diverging requirements. From headlines declaring race organisers' concerns about the future of F1, to team owners saying Liberty Media – which

F1 is complex and political because so many businesses are involved

Despite the culture of celebrity, fans know very little about the lives of the F1 drivers

bought F1 for £6.4bn in 2017 – underestimated what it had taken on, there are plenty of competing voices vying for attention, and they are often critical.

"It's a very complex sport," says Roberts. "You have a set number of teams and race promoters – they are separate companies from F1 – and you have sponsors. They all have a piece of the pie."

He must be sure that any research by F1, giving insight into the sport, is shared equally, so that no team has an unfair advantage over another. With no overarching F1 sponsorships, each team arranges its own, which means the competition between them stretches in many directions.

So where did Roberts start when building the insight department from scratch? Sean Bratches, managing director of commercial operations at F1, hired him with a rather vague remit, he explains, to "just build up lots of good research". "I realised it was down to me to shape what we did," he adds.

"Nothing really could have prepared me for understanding how the sport works from within"

First, he created a team that included Sky colleague Greg Morris – "a sports fan who knows numbers like the back of his hand" – a digital expert and a data analyst. The team is now five strong.

Getting the research up and running was similarly fast-paced. "Sean said: 'We want to understand fans; we need to do fan tracking; we need to see segmentations; we need something up and running over the summer.' This was already May – and I didn't even start working until 1 June," says Roberts.

It began with Flamingo doing an in-depth brand study (see panel, page 44) consisting of focus groups in the UK, the US and Brazil, with a mix of non-fans, lapsed fans, casual fans and avid fans. "We did semiotics, brand mapping, looking at social media. The goal was to understand where the F1 brand sits in people's minds, and what we need to do to make it more appealing," says Roberts.

This fed into how it created its tracker, as well as a marketing campaign. Flamingo produced a brand book outlining all the facets of what F1 needed to do to improve the brand. "Quite a lot of the directors have that book on their desks. It is a stepping stone for everything that we've done since," says Roberts.

One barometer of success for the new F1 was whether it could grow fans and fan engagement. Ipsos won the business for its fan-tracking research, delivering the first wave (from seven markets) that July. "We had six segments put together. It was quick – 14,000 interviews from May, to have

Matt Roberts has built an insight team at F1 feeding information into all aspects of the business

results in July. Our tracker is about to go into wave eight. Now we do 1,000 sports fans in every market, and we're up to eight markets every quarter."

Another focus is getting fans to do more. "Back in Bernie's [Ecclestone's] day, we didn't have a Facebook page or any social media videos, and the drivers weren't allowed to put anything out. Just by developing those areas, we're driving people who are casual fans to become more avid and do more things within the sport," Roberts says.

The biggest challenge, he adds, is the same one he's found in previous client organisations – getting the insight seen and acted upon. "We've learned that there are some people here who won't sit in a room for an hour and look at a presentation – and they are the ones we need to start thinking about. Do we need one page, five bullet points, this is what you need to know, how you need to act? Do we need an infographic with just key findings?"

Every Friday, the insights team sends

Flamingo brand study

Superficially, F1 appeared to be about the fastest cars in the world racing in front of a privileged global elite. Digging deeper, Flamingo identified 10 core essentials of the brand.

Insights were gained from three sources: fan group discussions; cultural analysis of F1 collateral; and network mapping to see where F1 sits in relation to other cultural elements.

- F1 is a spectacle more than a sport – give fans more to look at
- It is a test of physics rather than biomechanics – a need to continue to ask the big questions: what is possible?
- F1 is about human characters and virtues more than national identities – reveal drivers' characters
- It is a game of risk/death – small errors must be heavily punished
- F1 is 'the best' – compare/spread its know-how to other fields of endeavour
- F1 is not about cars – an opportunity for more non-auto tech brands
- It has licence to be ruthlessly commercial – but business must not harm the spectacle
- F1 is not a meritocracy – an issue for the US where sport is democratic
- Fans are an intensely connected subculture – brands need F1 to connect to this group
- F1 sits in good company – closely neighbouring luxury timepieces and action adventure.

the senior executives – Ross Brawn, Chase Carey and Bratches – a note with three things they need to know. Roberts says that, for some stakeholders – who aren't necessarily very research literate – even basic surveys can make a huge difference compared with the days when there was no insight team.

"Sometimes, you do something with our community with, say, five questions. They're like, 'oh my god, this is so helpful'. There are really easy wins with some people here, who are just amazed to have any numbers. Then you've got a strategy team who want you to go deeper into the data," Roberts explains.

Two things stood out from his team's early research – the first being that F1 didn't do enough with the drivers. There are only about 20 F1 drivers in the world, but the research found that about 60% of sports fans globally couldn't name more than three of them. Despite the current culture of celebrity, the fans didn't know anything about the drivers' lives, as most of them weren't on social media, with the exception of Lewis Hamilton and one or two others. "We had to elevate these drivers – they are our stars of the sport."

The second thing revealed by the research was that many people described F1 as 'just cars going around a track'. This is perhaps because TV gains F1 an audience, but loses the intimacy and dulls the sense of a race, compared with the live experience

"They don't really appreciate the speed and that the drivers are proper athletes," says Roberts. "Have you ever tried to move the steering wheel of an F1 car or put your foot on the accelerator? It's so hard – you've got to be so strong. These guys are really pushing themselves to the limit of what is capable. They've got to concentrate at 200mph for two hours."

The research resulted in F1's first ever ad – created by Wieden + Kennedy – called 'Engineered Insanity'. This tries to make the viewer feel what it's like to be a driver, highlighting the visceral aspects of the sport.

To build the drivers' profiles, F1 has created events to get them together in city centres, in front of bigger crowds. "It's not just for avid or casual fans – we're trying to get them to be more well known, giving them content around the sport that they can put on social media. The problem is, Lewis Hamilton does it really well, but some others, such as Sebastian Vettel say, 'I'm a private person. I don't want to do social media'," explains Roberts, who says about half the drivers have bought into the idea.

"There are really easy wins with some people here, who are just amazed to have any numbers"

Race visitors' behaviour can vary considerably from one country to another

"In the US and China, the average fans are really young because it's not an established sport"

"We've still got some who don't understand that they need to push themselves out there a bit more."

As a global sport, there's the added complication that fans can behave quite differently across countries. With tech company Meshh, the insights team has used sensors to track fans' mobile phones and Wi-Fi analytics, and can monitor their behaviour when they attend races – such as looking at whether they go to the fan zone or the merchandise store.

"We found that Middle Eastern fans are incredibly different, in terms of their behaviour, from European fans," says Roberts. "The Middle Eastern fans spend a lot of time in family and kids' areas, and not that much time watching the racing – it's a family day out for them. In Bahrain, 30% of people did not move from the fan zone. In the fan zone, you can't see the track. For the European fans, it is more centred on the racing."

Other research focused on the sport's online community, F1 Fan Voice. Working with sports-data consultancy, Goodform – and using FlexMR for the platform – Formula One now has a community of 53,500 global fans it can tap into for surveys and polls.

So, what's been the most surprising thing that Roberts has discovered?

"When I came here, I assumed that all our fans would be men in their fifties. In the US and China, the average fans are really young, because it's not an established 70-year-old sport like it is here; it's a 15 to 20-year-old sport or younger," he says.

While the younger fans are more digitally savvy, the older, European ones are more TV-focused – which creates its own challenge. "We want these guys in Europe to use more of our touchpoints. We also want to encourage younger fans to become interested in the sport; that's a whole 2019 workstream – how we engage younger fans more in Europe."

It is making progress. In the company's Ipsos survey of people who identify themselves as having become a fan since 2017, 62% are under 35 and 37% under 25.

"We're doing a good job, mainly through all these initiatives that we've launched to drive that younger interest – social media, videos, F1 Fantasy, eSports. We just need to do a bit more of that, I think," says Roberts.

Responding to the race

Populus, along with its technology partner MindProber, ran what it claims to have been the world's first biometric survey for a live televised sporting event, for F1.

Using biometric technology – galvanic skin response (GSR) – it can identify which moments are the most engaging. The data collected measures emotional arousal and stress, overlaid with respondents' reported reactions (submitted into an app before and after the event).

The results meant F1 could track and optimise TV production to improve the fan experience – for example, by changing camera angles and commentary.

"We're trying to understand what drives engagement during our races," says Roberts. "We did a pilot at Silverstone and, in 2019, we're going to do it at every race. You get a wonderful dashboard with the video playing and the line going across it, and you can see when they're engaged, when they're not engaged.

"If we, in our broadcast feed, are showing too many pit stops that people just don't find engaging, we can change that," he adds.

Turn On, tune in

Research is built into the foundation of Sky Media's ad model, helping it adapt and evolve in a changing media landscape. Ben Bold talks to Lucy Bristowe, **its head of insight and research**

Sky is at the forefront of Europe's broadcast entertainment industry, serving 22.5m customers across seven countries, including the UK, Ireland, Germany, Italy and Spain. It spends £6bn a year on programming and generates annual revenues of around £13bn.

While a sizeable proportion of its income is generated by subscriptions to its 'linear' (traditional broadcast) TV and digital services, much of it is made up of advertising revenues. This is where Sky Media comes in – the company's dedicated ad-sales arm that works with agencies and brands looking for exposure across TV, online and on-the-go.

"It is the job of my team to find innovative solutions to measure the effectiveness across either one or all of these platforms," explains Lucy Bristowe, head of insight and research at Sky Media. "It's no longer enough to find customers who are exposed to messages by asking them outright, through traditional means. We have to be smarter than that."

Being smarter has helped shape Sky Media's approach to research internally, but the organisation is increasingly combining its own data with that of third-party-generated research. "We still need traditional research that gives us insight into the 'why' behind the behaviour that leads to an action," says Bristowe. "For example, when researching changing viewing behaviours and consumption, it was a diary study that gave us insight into why video on demand (VoD) was so engaging – watching with others, watching content when they want, on a big screen, when in a certain mindset. Data alone can't tell us that."

Modest but hard-hitting

Reporting to Sky Media managing director John Litster, Bristowe is something of a Sky veteran, having joined the company in May 2005 from Channel 4, where she was head of research. She has held several research posts at Sky, including on the content side of the business for a couple of years.

Given the size of the TV marketplace and the plethora of challenges faced by traditional players, Bristowe's 12-strong team may be big by some organisations' standards, but the scale of its remit is broad.

"We're covering a lot of ground," she says. "We're not only commissioning research, we're using internal data sources to create insight and stories for our sales teams, and conducting research across our suite of products, such as Sky AdVance and Sky AdSmart."

Sky AdVance works with cross-platform ad campaigns and aggregates viewing data from Sky households on its viewing panels with either a programme, ad spot or sponsorship. AdSmart encapsulates the scope of Sky's research, marrying the traditional – brand TV advertising – with digital technology. In part a response to the migration of advertisers to more targeted digital advertising, it was launched in 2013. Using Sky subscriber data, it allows brands of all sizes to target specific households with bespoke messages at a fraction of the price of traditional TV.

Sky can evaluate campaigns using an

array of behavioural and sentiment matrices – and because it can attribute sales to households exposed to specific ads, Sky can further refine targeting after identifying audiences that performed strongly and those that performed less well. This allows subsequent campaigns to be fine-tuned, hitting high-performing audiences, cutting waste and boosting return on investment (ROI). In the past year, Sky AdSmart has attracted around 350 new clients, including Asda, Princess Yachts and GoCar in Ireland.

Working with stakeholders

While Sky Media is Bristowe and her team's stakeholder, they also collaborate with other areas of the company, including Sky Business, which supplies services companies such as pubs and clubs. She and her colleagues consult – the research team at Sky's programming arm to "compare notes on techniques such as macro trends, eye-tracking to gauge viewing habits, and new ways of using data". They also represent Sky on the industry side, attending committees for industry bodies such as the Broadcasters' Audience Research Board (Barb) and Thinkbox.

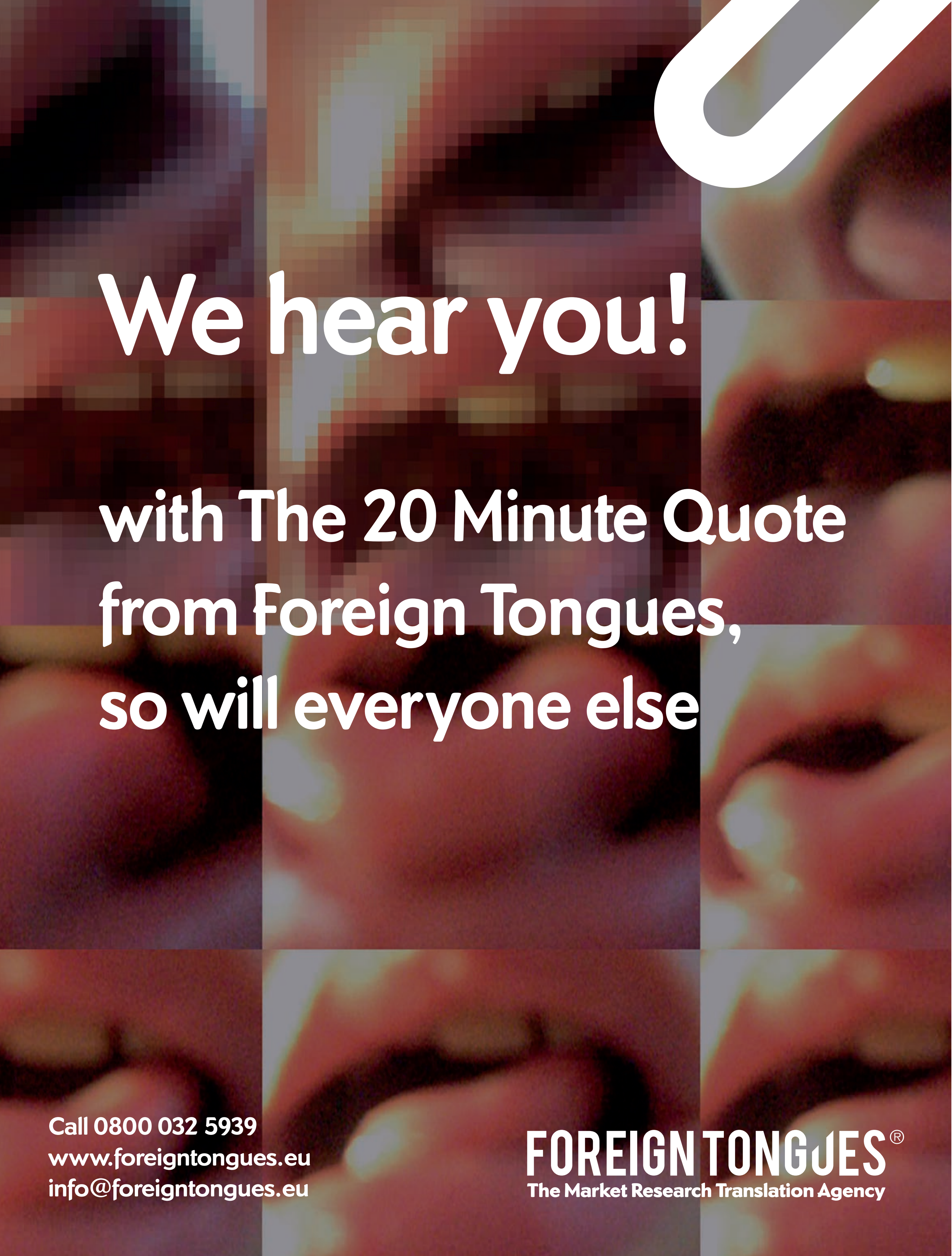
"The great thing about Sky is that you're not prevented from trying out new things," Bristowe says. "It encourages you to use data in an innovative way, giving help and support around issues such as GDPR." For instance, the company gives presentations and offers guidance on the General Data Protection Regulation, and how Bristowe and her team can navigate the legislative complexities of EU regulations.

Sky may have earned its reputation operating in traditional linear broadcast, but TV is facing more and more pressure from changing media-consumption habits. Given the explosion of digital and social advertising (see panel, opposite) on platforms such as Facebook and YouTube, Sky cannot afford to sit back.

For Bristowe and her research team, this means convention often doesn't cut it. All the customer data in the world can only tell you so much, and this is why Sky is always on the lookout for new research techniques.

Sky Media works with an array of agencies – some on an ongoing basis, such as Nielsen, BVA-BDRC, Populus, Future Thinking and Differentology, while others are cherry-picked for pieces of work that require a bespoke approach.

"We always look for agencies that can bring something new," Bristowe says. "We don't have a strict roster, but have the flexibility to move around and find the best solution, depending on the brief that comes in. We have a healthy mix of research that is for specific brands with a specific objective, as well as some ongoing and behavioural."



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An example of the latter is Sky's out-of-home viewing tracker, which "has been running for several years now with Ipsos Mori, and gives us a reliable picture of sports events viewing out of home in pubs and in clubs".

"We have improved the methodology to have overnight sports fixture ratings received the following day," Bristowe adds. "This tracking study is not only used by Sky Media, but also by Sky Business."

Sky Media's work with Boston-based emotional measurement firm Affectiva is another example of a broader research project. The partnership allowed Sky to gauge the emotional reactions of AdSmart viewers using facial coding and emotion analytics software across 1,000 webcams, 20 hours of footage and tens of thousands of data points. It found that AdSmart viewers have a 13% higher emotional response rate than their linear TV counterparts, with engagement levels achieving a 21% higher rate.

Biometric measurement

"We are always on the lookout for new ways to research either behaviour or specific creative. We work closely with our key partner and sponsor of Sky Atlantic, Volvo, to test the fit and appeal of the creative. For this, we have used biometric skin response – it tests the creative appeal we can't get to using traditional research methods."

In 2018, Volvo sought to improve brand perceptions beyond those of its competitors with bigger marketing budgets. To gauge emotional reactions to a set of creative idents on the theme of plastic pollution that appeared around Sky Atlantic programmes, Sky and market research agency Future Thinking used biometric research, including facial expression analysis and eye-tracking, to understand emotional response to the campaign. Post-campaign analysis showed that the sponsorship's impact led to higher consideration levels and purchase intent, up from 44% in 2016 to 73%.

Another example of Sky Media's data-rich approach to advertising was for supermarket chain Asda, which last year used the platform for a Ramadan range campaign aimed at South Asians. Using

Changing viewing habits

According to Ofcom's *Media Nations 2018* report, UK subscriptions to Netflix, Amazon and Sky's Now TV have outstripped linear TV services, reaching 15.4m in the first quarter of last year, beating traditional channels by 300,000.

This shift has been mirrored by a fall in revenue, with the UK's pay-TV sector experiencing a 2.7% fall in revenue, to £6.4bn. Conversely, streaming services contributed to a 25% growth in audio-visual revenues, to £2.3bn in 2017, as TV ad income fell by 7%, to £3.9bn.

The length of time spent watching broadcast TV is in constant decline – in 2017, it was an average three hours 23 minutes a day – a fall of nine minutes from 2016 and 38 since 2012.

Meanwhile, the growing popularity of digital video has resulted in advertisers allocating £2.52bn to the medium, according to eMarketer. Digital spend in the UK rose 15%, to £6.4bn, in the first half of 2018, according to IAB data published in October, with online video ad spend increasing 40%.

UK subscriptions to Netflix, Amazon and Sky's Now TV have outstripped linear TV services

AdSmart's proprietary Geo-Flex technology, which combines and analyses Sky's customer data with Experian Mosaic data, Sky could reach those consumers with a high propensity to purchase, who lived near a participating store.

The campaign delivered more than 1.5m impressions. Working with research agency BVA-BDRC, Sky conducted online interviews with Sky customers, allowing Asda to assess the campaign's impact on those the ads reached compared with a control group of consumers who were not targeted.

Retaining values

Today's advertising marketplace is characterised by innovation and a furious pace of change. It is a marketplace that has also fallen victim to dodgy practices, however – from a lack of transparency in media trading to the sometimes irresponsible use of consumer data and growing concerns around brand safety. So Bristowe is quick to stress that the pace and scale of change should not come at the expense of openness and transparency.

"Bristowe is quick to stress that the pace and scale of change should not come at the expense of openness and transparency"

Last year, the research and insights team adopted Sky's 'Bigger Picture' values, which include "being fair and responsible, creative and action-orientated, customer-led and jargon-free, forward-looking, collaborative and inclusive". The team meets informally every few months to share ideas and discuss how those values can be put into action.

"We really stick to those values and they help to guide us, not in terms of taking ridiculous risks, but by pushing boundaries all the time," Bristowe says.

Pushing those boundaries and continuing to up the game is a constant challenge for Bristowe and her team, however. "Obviously, we want to measure as accurately as possible. It is expensive, but we're looking to the long term – looking to collaborate more with other broadcasters and do things together. That's a challenge because everyone is juggling different priorities within their own organisation."

Other issues Sky faces include measuring differing blends of platform for different brand campaigns while conforming to industry standards. "We're working with Barb to ensure that we make things such as Dovetail, which aims to measure total reach of programme and commercial audiences, work well for everybody.

"The challenges bring with them loads of opportunities around data, and around the scope and scale that we've got to work with."

Despite the challenging environment, Bristowe and her team's work in research and insights appears to be paying dividends. In July 2018, Sky posted UK and Ireland advertising revenues of £540m for the year, up from £508m in the previous year.

Road testing

Highways England is increasingly using behavioural insights to gain a clearer understanding of why people drive the way that they do, as it looks to make roads safer. By Katie McQuater

It's human nature to think that we are better at driving than we actually are. We may know what we are supposed to do to prepare our vehicle before starting out on a long journey – or the right steps to take in the event of breaking down – but the reality may look very different.

Likewise, we don't tolerate speeding or tailgating by other drivers, but may engage in the same negative behaviours ourselves. "People blame other people. They always say, 'oh, it was the other person who stopped or braked sharply'," says Manjit Galsinh, head of insight at Highways England.

The perception gap between reported and actual behaviour is an issue facing all researchers. For Highways England's insight team, however, tackling this is imperative to identifying and addressing the biggest misconceptions among drivers – and could, ultimately, help to save lives.

The organisation has recently embarked on a behaviour-change programme, with a particular focus on road safety, as it looks to dig deeper into people's understanding and experience of driving.

As the government organisation responsible for operating, maintaining and improving England's motorways and major trunk roads, Highways England looks after the strategic road network. This totals 4,300 miles and carries a third of all traffic in England by

mileage, and two-thirds of all heavy goods traffic. In short, maintaining it is a huge job, and understanding drivers' behaviour is just as gargantuan a task – particularly when driving is often something we do without full awareness of the decisions we make.

Sitting within the corporate affairs and communications directorate, Highways England's nine-person insight and evaluation team is responsible for ensuring that the organisation's road-safety campaigns are rooted in insight, with the aim of supporting three imperatives: safety, delivery and customer service.

"We capture and unify the customer voice so it can inform our decisions and influence campaign messaging – ultimately to improve safety on the network," says Galsinh. "We also support our improvement schemes to ensure the views of the customer are always considered."

The insights programme is often geared around increasing understanding of specific themes, because – without up-to-date insights – it is difficult for Highways England to make decisions. One area it has been focusing on recently is breakdowns – specifically, drivers' understanding of what to do in the event that their vehicle malfunctions on the motorway.

Previous research by the organisation had highlighted that fear of breakdowns was a source of anxiety for many motorists, so it decided to take a new approach to the issue – looking at how that insight could influence campaign messaging and lead to behavioural change.

"Although people have breakdown cover, they tend to put the documents in a drawer and don't store emergency numbers in their phones – so breaking down has massive safety implications, particularly if there's a misunderstanding about what you're supposed to do," says Galsinh. "Reasonable, rational, average drivers can still break the rules and do irrational things."

Highways England worked with Irrational Agency on the research, to understand the experience of road users and people's perceptions of what they should do if their vehicle breaks down. The agency first conducted qualitative research, followed by implicit testing methods where drivers were asked what they would do in specific situations – for instance, whether they would remain in the vehicle after breaking down on the motorway, whether pets should be left in the car, and whether a red warning triangle should be put out.

Implicit tools were used to uncover the processes that underlined participants' decision-making. They had a limited amount of time to answer because the researchers wanted to gain more clarity on people's initial, intuitive impulses. "It was a very implicit response to understand what they would do, because you don't have a lot of time to think if you are in that particular situation," says Pankti Shah, behavioural economist at Irrational Agency.

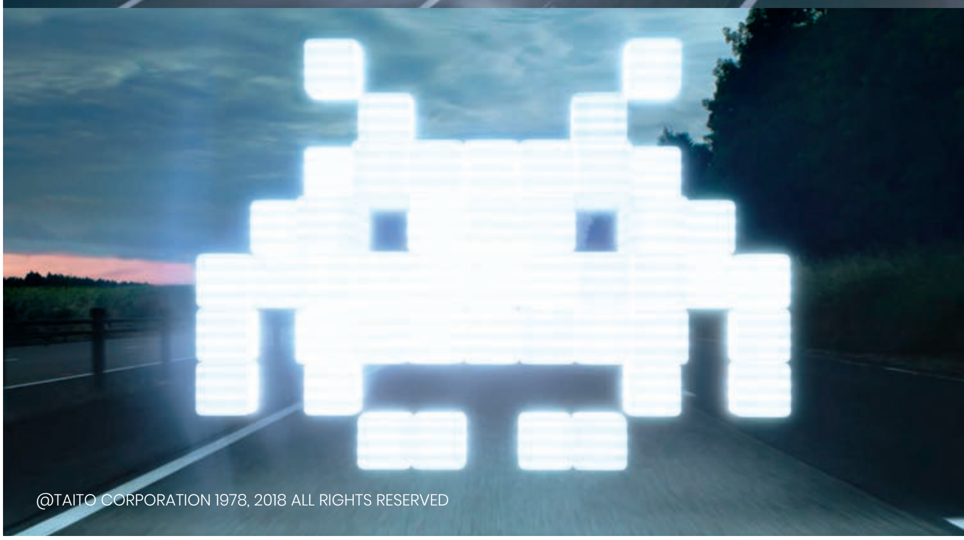
The research identified some confusion among respondents about breakdown advice, particularly how it differs for smart motorways, where there is active traffic management such as variable speed limits and hard shoulders. It also found that the principle of least effort runs through all drivers. This often leads to over-reliance on car technology, and drivers forming shortcuts or heuristics – such as MOTs and annual services – so they don't check their car before going on a long journey. The issue is complicated further by the fact that people's cognitive ability is likely to shrink when they panic.

Again, one of the challenging aspects of the research, according to Shah, was trying to get to people's underlying consciousness. "When you talk to people, especially in a qual space, they say, 'of course I know what to do when I break down' – but we knew that wasn't true. So it was challenging to make them feel comfortable to admit that, actually, they wouldn't know what to do."

Likewise, people would say they always check their tyres, adds Shah, "because it's all default; of course you do that – but do you actually do it? There is a difference-between-intention-and-action gap there."

The research highlighted the need for short, sharp messaging that would be memorable for drivers in a panicked, breakdown situation. "This project has the potential to influence safety on the network, so it was a high priority for us – especially if it can reinforce the safety message and help save lives," says Galsinh.

The findings are being fed into campaign development and shared internally, with a view to influencing the delivery plans of safety teams.



"Ultimately, if we can change negative behaviours we can save lives, so anything that helps in that respect is always welcome"

Highways England's 'Stay safe, stay back' campaign targets tailgating drivers

Internally, there is a "massive appetite" for behavioural insights that have the potential to lead to behaviour change through campaigns, engineering or education, adds Galsinh.

"Ultimately, if we can change negative behaviours we can save lives, so anything that helps in that respect is always most welcome," he says.

The insight team still links much of the innovative behavioural work to traditional methodologies, however,

Stay safe, stay back

Tailgating was the subject of one recent behavioural insights project, which resulted in the launch of Highways England's 'Stay safe, stay back' campaign, featuring characters from iconic arcade game *Space Invaders*.

Highways England brought together different methodologies – focus groups, surveys and behavioural approaches – to understand the problem of close following, and to test various messaging and ways of reducing the behaviour.

It conducted a large amount of insight on drivers' attitudes towards different negative behaviours, and found that tailgating was the one that caused the most frustration and anxiety among motorists – and, potentially, leads to other negative behaviours.

Implicit reaction-time research by Ipsos Mori for Highways England found that drivers view tailgating as the biggest problem on A roads and motorways, with 62% of participants agreeing emphatically that driving too closely behind is a major issue. However, 27% admitted tailgating, at least occasionally, in the three months before the survey.

Highways England decided to focus on tailgating from a campaign perspective, "so that once we tackled this area it would have a knock-on effect on some of the other negative behaviours such as speeding, rapid lane changing, or sharp braking," says Galsinh.

The organisation showed participants two videos – one with 'mild' incidences of tailgating and the other with a few more 'extreme' examples – and applied facial-tracking software to see how they reacted. Galsinh said the approach was "almost like holding up a mirror". It helped to set baselines and assess the levels of tailgating that triggered reactions from drivers, as well as whether tailgating in any form is considered unacceptable, or just the extreme cases.

The creative campaign, which included a car-bumper sticker, was developed by Adam&EveDDB.

A classic computer game was used to promote Highways England's message on safe distances

regularly mixing various methodologies and sources of insight to gain more depth on an issue. "It will depend on the project requirements and what level of evidence and robustness is needed," says Galsinh, "but we try to do it to validate and test our understanding, and explore whether there's anything we've missed."

Often, it comes down to giving the right type of information, depending on the stakeholder internally, he says. "Some people are comfortable with numbers and others are happy with the qualitative approach – it's just about meeting everyone's needs."

Using techniques such as facial coding or eye tracking – which the organisation employed to test reactions to the new yellow emergency breakout bays on smart motorways, as well as in its tailgating research (see panel) – isn't an exact science, says Galsinh, but it does offer "an extra layer" of insight that can be useful.

"It can be quite objective – rather than having an ethnographer noting down facial expressions it's good to have a piece of technology that automates it and does it on a consistent basis."

"Breaking down has massive safety implications. Reasonable, rational, average drivers can still do irrational things"

In terms of ongoing monitoring and measurement, Highways England conducts a monthly longitudinal survey of 1,800 road users across England, to establish baselines and monitor fluctuations over time.

Questions range from asking road users about specific stretches of motorway to their view of Highways England's reputation – so the survey also acts as an "early warning system", says Galsinh, highlighting emerging themes and priorities, such as customer perceptions of a new roadworks scheme.

"It might be that we've got communications around a scheme wrong – it allows us to be really responsive to those customer needs."

The team also undertakes reputational and stakeholder surveys, and produces dashboards that mine social media platforms for supplementary insights to give context to quantitative data. It is now creating libraries of insight products and looking at investing in self-service tools, automated reports and data dashboards, to open up access to the insight function's services within the wider organisation.

As a government body, measuring campaign impact is a key priority, so it has recently created an evaluation function within the insights team to support continuous improvements, track progress in campaign delivery and suggest improvements to future campaigns. But what about measuring behaviour change in the long term?

Survey data is only one aspect of a wider evidence base helping Highways England assess the impact of campaigns – government data, such as killed or seriously injured casualty statistics, may also be used.

"We could make a leap of faith that, because there's been a reduction in KSIs [key success indicators] – because of reductions in tailgating or speeding – it could be as a result of a campaign. It's obviously very difficult to prove cause and effect, but it does give us an indication of how successful a campaign has been."

Seeing things clearly

Insight and data are helping some organisations to adopt a more 'radically transparent' approach, fostering trust and gaining a competitive advantage. By Rob Gray

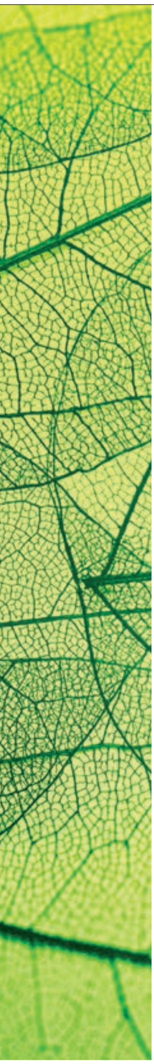
Organisations are under increasing pressure to be more open about their business activities and supply-chain partners. However, the majority still fall short of the ideal.

Highlighting this point, the Alliance for Corporate Transparency recently published its *2018 Research Report*, which examines the state of corporate sustainability disclosure under the EU Non-Financial Reporting Directive. The research found that only 50% of companies are publishing information on environmental matters that is clear on concrete issues, targets and principal risks. The picture on social and anti-corruption matters is even worse, with more than 60% not up to scratch.

Although most companies still have far to go, several organisations have led the way in making their business practices more visible – for example, by demonstrating the credibility of their supply chain to help consumers and clients make more informed decisions. This approach is often labelled 'radical transparency'.

Outdoor clothing brand Patagonia is an oft-cited example of transparency; it's very honest and open about how its products are made and where materials are sourced, to the point of publishing comprehensive 'Footprint Chronicles' information about its supply chain. US charity GiveWell, meanwhile, goes so far as to put up a list of its shortcomings on its website.

This raises the question of what role insight can play in helping organisations become more transparent. Plenty of companies run community



panels, but how might they go beyond simply listening to consumers? Can they use mechanisms of this kind to be more transparent about their own processes and allow consumers to ask the company questions? In other words, almost conducting research in reverse.

Coventry Building Society has adopted such an approach, running a pilot 'reverse-focus groups' initiative, that allowed selected panel members to ask questions of the executive team. Members led the discussion and the session took place in real time, with two executive directors answering the questions.

For Coventry, this was about true engagement, giving customers the opportunity to talk about the things that matter to them. It also helped the building society to remain true to its mission of putting members first.

"We decided quite early on not to make any topics out of bounds," says head of market research Emma Baxter. "It was completely up to the members to decide what they wanted to talk about on the day. But we had to put a bit of structure into it because, otherwise, we'd have ended up with 100 different topics. So we got them to say in advance, 'this is what I want to talk about' and to vote on each of those ideas. All of this was done quite transparently – on the member panel, so they could see what other people had said. We then picked the top four most popular topics."

"Traditional research tends to be skewed towards asking rather than listening"

The directors asked not to be briefed on the questions in advance because they preferred not to come across as scripted. Spontaneous answers added to the air of openness, says Baxter, by sounding "more human and less corporate".

Chris Martin, chief marketing officer at FlexMR, which runs Coventry's 4,000-strong panel, says: "This direct interaction, to some degree, starts to replace reports – which are inherently more detached and less memorable, and which can be damaging to culture."

Baxter was very conscious of Coventry having a mature research programme that followed the organisation's agenda. "Traditional research tends to be skewed towards asking rather than listening," she says. "You can put open questions into surveys and do focus groups, but it's still us wanting to talk to people on topics of our choosing.

"We wanted to understand what's important to members if they lead the agenda with the topics they want to talk about. It gives you a different lens in terms of your insight." Coventry intends to run reverse-focus groups along these lines around twice a year.

Building society Nationwide allows members to take part in online 'live chat' conversations with senior leadership – and, in the first of these, the group chief executive took unfiltered questions.

"Our research has shown that members appreciate the less formal nature of these chats where they're not receiving 'the party line' answer to their questions," says Drew Drewery, research manager. "There are no limits to the numbers who can view and participate, enabling us to engage with as many members as possible."

In addition to the online chats and regular in-person 'talkbacks', members can use Nationwide's 'connect' online panel to discuss topics with each other and the society.

There are certainly different ways of approaching this. Several years ago, Suzanne Rubin, then president of American Airlines' AAdvantage frequent-flier programme, took to the skies with passengers, with the express purpose of answering their questions and taking their suggestions on board (in every sense!).

Of course, there's more to transparency than answering questions. Some organisations are breaking new ground by sharing their data and metrics with the public, often for the dual purpose of building trust and highlighting a point of difference for competitive advantage.

US online financial services start-up Aspiration, a 'socially conscious' business, has used its metrics to compile a list for shoppers highlighting companies at the forefront of sustainability and respect for employees.

Fashion retailer Reformation, meanwhile, calculates the environmental impact of each garment it makes, adding together carbon dioxide (CO_2) emissions, water use and waste generated. Then it works out a 'Refscale' score, showing how much its garments reduce these environmental impacts compared to typical, less sustainably produced clothes. Finally, this information appears on every product page of its website, to quantify the impact each Reformation garment has on the environment.

In an era of low consumer trust in business, radical transparency – research-led or otherwise – is one way in which brands can stand out from the crowd.

Intelligent pathways

In a challenging business environment, an insight-led approach can offer the key to unlocking growth. By Julie Kollman **and** Andrew Curry

Businesses face a set of increasingly tough questions. Long-run growth rates, which have been slowing for 50 years, are approaching stagnation point. Business volatility is on the rise as markets are destabilised by technology, shifting values, political turbulence, and resource and planetary challenges. According to the *Financial Times*, the top 700 global businesses saw profits decline by 25% in the five years to 2017.

There are, of course, pockets of growth to be found in even the toughest business environments, although they are harder to see. The companies that spot them tend to be better attuned to how social patterns are evolving, consumer spending is changing and markets are responding and being re-shaped.

This is part of a bigger story about business value, which is becoming increasingly intangible. Most of a corporation's financial value now lies in its corporate, customer and brand equity – a far more fragile asset than factories and equipment. Between 1975 and 2015, the share of market cap of S&P 500 companies accounted for by tangible assets fell from more than 80% to less than 20%. Intangible assets are more vulnerable to external change and their value can shrink surprisingly quickly, as Kraft Heinz discovered at the end of February.

In our report on responsive businesses and Intelligence Capital, published by the Market Research Society, we argue that businesses that find growth in this world are pulled by markets, both existing and potential, rather than being pushed by the current capabilities of the business. They also learn more quickly that their environment is changing, and translate this learning into effective action. Responsiveness is a form of business agility that is driven by the needs of customers – present and future – and alerts the business to new and emerging external risks. These things don't happen by accident. They need to be designed into the business. Intelligence Capital™– like physical and human capital – is a source of competitive advantage to those who are committed to using it.

Understanding Intelligence Capital

Intelligence Capital can be defined as 'a comprehensive knowledge asset coupled with the capability to use that asset to identify and activate growth opportunities'. It is about knowing what you need to know, and how best to use it, to make a difference to business performance.

It combines information, processes and people to scan the wider environment, the marketplace and the business' own performance, to understand how each of these is changing and act on this. This creates new value, finds growth opportunities and increases the speed of the business and the flexibility needed to learn and respond to change.

Intelligence Capital has three components:

- **Structural intelligence:** This is the sum of what the business knows about its customers, operating environment and broader business context to identify growth opportunities and risks, spotting market changes more quickly than the competition
- **Activation intelligence:** This is the knowledge used to define the actions businesses take to capture those growth opportunities, including acquisition of new knowledge as well as learning from past activities. Activation intelligence is how the organisation responds more quickly and effectively to the market
- **Human intelligence:** Structural and activation intelligence accumulate information, but humans are required to assess it, draw relevant insight from it, and apply that insight effectively, so this is arguably the most critical component. It is the engine that transforms intelligence into action.

There is no magic formula for balancing these types of intelligence, but all three need to be locked together if they are to be effective. Our research with C-suite executives found that businesses struggle to get the balance right between structural and activation intelligence, and that most under-invest in human intelligence. As the entrepreneur Morris Chang said: "Without strategy, execution is aimless. Without execution, strategy is useless."

Diageo has sought to reduce innovation times by developing a new capability, Fast Forward Lab, which delivers consumer insight to the business in far less time, sometimes in less than 48 hours. Diageo has found that this adds most value when applied in activation mode or when better evidence is needed around concept development.

Charlene van Zyl, who introduced an intelligence system at South African retailer Woolworths, says the quickest gains come from better processes. "How the internal insights team works with each other to ensure quality and consistency; asking the right questions and being clear on the outcomes; having processes of aligning outputs with the business before distribution… These things are the most important, but also the most neglected."

Making the investment case

The gap between how marketers see the value of marketing and how it is perceived by finance teams is well rehearsed. If Intelligence Capital is to be effective, marketers need to frame it as a value proposition. Intelligence Capital creates value by:

- Unlocking new revenue streams by identifying growth sectors
- Strengthening brand value by understanding non price-based reasons for buying
- Increasing speed to market, which improves returns to innovation
- Increasing business impact through the learning loop embedded in the Intelligence Capital approach.

When the lion's share of corporate value is intangible, thinking of customer and market knowledge as a business cost is a dangerous game. It is a hangover from the 1950s and 1960s, when marketing could be regarded as an add-on. It is time to have new conversations about the returns on intelligence. If Intelligence Capital is to become an asset, its advocates need to be more businesslike, thinking clinically about the business value created through their analysis and actions.

The final element in building Intelligence Capital is an intelligence culture. In our research for the report, Nick Rich of the Carlsberg Group described a company with a strong intelligence culture as "an organisation that recognises, incentivises and celebrates enhancing knowledge and learning".

Businesses that grow do so by finding new pools of value. Intelligence Capital lets companies make choices about the future they want for themselves, their employees, and their customers. It is not about what you know; it is about choosing your own future.

Julie Kollman is chief research officer at Kantar and Andrew Curry is director at The Futures Practice, Kantar. The report is available to download at mrs.org.uk/resources/intelligence-capital

A dangerous point in the cycle

Bear markets ignore good news and bull markets ignore bad news, but what do highly volatile markets do? They punish any profit shortfall or disappointment by slashing and burning the share price. It has been a harsh pattern of market behaviour, which has been regularly repeated over the past quarter.

The latest to join the list of casualties is online estate agency Purplebricks, which warned on 21 February that its full-year revenues would be £35m lower than expected – between £130m and £140m against previous guidance of £165m and £175m. And the market's response? It marked the shares down severely: 40p – or 24% – to 125p. In March 2018, the management had sold stock to German publishing giant Axel Springer at 360p per share – nearly three times more than the currently prevailing share price. Hell hath no fury like Mr Market when blue-sky expectations turn into a flood of red ink...

Elsewhere, McBride, the own-label cleaning products company, issued an unexpected profit warning on 19 February, just a day ahead of its scheduled interim results, saying profits would be down by between 10% and 15%. The market reacted ruthlessly, marking the shares down by 32% – or 41p – to 89p, harshly discounting in the share price nearly three times as much as the likely profit shortfall.

Plus500, the spread-betting company, sold off heavily when it issued an unexpected profit warning on 12 February and referred to a 'drafting error' in its annual report. It had stated that the company did not generate gains or losses from client trading positions but had lost $103m in 2017 and made $172m in 2018. The shares collapsed by 31%, or 503p, to 1133p. The founders had sold stock worth £256.8m over the past year and the market dubbed Plus500 Minus500.

On 23 January, Metro Bank also issued a profit warning and revealed a mistake in its loan book that knocked its capital ratio. The shares crashed by 39%, or 857p, to 1345p, as the market speculated that Metro may need to raise more capital. It had tapped shareholders for £303m last July and £278m a year earlier, and Mr Market never rates a continuous printing machine.

To no-one's surprise, shares in UK regional airline Flybe collapsed 83%, to 2.9p, on 11 January, after the board recommended a bid at 1p per share from a consortium led by Richard Branson's Virgin Atlantic. This valued Flybe at just £2.2m, a far cry from its IPO valuation of £215m in 2010, but the alternative was certain bankruptcy and wasted fees to lawyers and accountants.

On 17 December last year, stock market darling Asos, the online fashion retailer, plunged 40% – from £41.86 to £25.51 – when it warned of a 'significant deterioration' in trading during November. This sent shock waves through the retail sector – if online champions were suffering, what hope for 'bricks and mortar' operators? Less than three months earlier, major shareholder Aktieselskabet offloaded 2m shares at £56.85 per share, more than twice the price post-warning.

"If online champions Asos were suffering, what hope for 'bricks and mortar' operators?"

One of the hottest summers on record did nothing to help tour operator Thomas Cook, the shares of which crashed 30%, from 48p to 33p on 27 November, when it issued its second profit warning in as many months. It said profits would be £30m lower than expected and the dividend would be suspended for the year. Hedge funds Marshall Wace and TT International had led the charge of the short sellers, with discloseable short positions well in advance of the profit warnings.

Mr Market is not in the mood for surprises and none has been greater than that served by cake chain Patisserie Valerie on 10 October, when it warned of 'significant, and potentially fraudulent, accounting irregularities and... potential material misstatement of the company's accounts'. By 22 January, the company had collapsed into administration. In July 2018, the former CEO and CFO had exercised options and immediately sold shares worth a combined £5.26m. They are now under investigation by the Serious Fraud Office.

The moral of this sorry tale? Caveat emptor – 'buyer beware'. It is late in the cycle after 10 years of 'free' money, Mr Market is in a viciously intolerant mood and insiders have been sellers – do not buy.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Ready for the artificial intelligence advance?

My inbox is filling up with invitations to analytics and research conferences. What always jumps out at these events is the range of approaches – from familiar analytics based on segmentation and econometric modelling to new thinking and the next big bets. Keeping abreast of advancements in analytics is an important part of my job and, right now, we see an interesting industry dynamic on show at these events. The noise and activity around larger data sets and applying cognitive research solutions is growing. At the heart of this is the progress of artificial intelligence (AI).

What really excites me about AI is that, for some time, it has felt like a distant, complex science, but now there is an opportunity for us to use it at scale. On a personal level, that means understanding its value to our industry and how to bring to life these analytical approaches in my day-to-day work. This is an opportunity to learn, and the increase in AI papers being presented at conferences is one way to do that. I am sure I am not the only one in our industry who is motivated, but also challenged, by how technical this area appears to be and how to bring it to life. So how will AI develop within our industry?

The role and value new data approaches bring to an organisation, and how big data sits alongside traditional consumer-based market research, is a regular debate when research budgets are being allocated. In the near term, marketing research based on direct questioning of consumers will not go away, but it is now more likely to be superseded by new, more complex data drawn from different sets of observable people-based data. When we link this consumer data to other meta data, we will increase our ability to connect attitudes to the outcome for brands and services through key performance measures such as sales and loyalty. Predictive research approaches, such as AI, are founded on these evolving data sets.

"Marketing research based on direct questioning of consumers is now more likely to be superseded by complex data drawn from different sets of observable data"

To make AI the norm, organisations will need to adapt to changes in this data provision. What is pleasing to see is that the technical foundations relating to data and storage are falling into place. Hosting these growing data sets at scale is a prerequisite and access to 'storage space' is more manageable than ever before. Being able to activate against the full potential of AI will mean shifting from traditional research timeframes. This will require insight and technology teams to create the foundations for faster sharing and recommendations.

It is against this backdrop that AI will begin to make a big difference – as the multiple factors affecting consumer behaviour are brought together in the same data sets. AI is not new, but the environment we all work in has changed. As we close out the decade, we will see an acceleration in the use of AI.

So is advancing AI a reality for us all in the research world? Absolutely, and our challenge is having the right skill sets in place. It will fall to analytic organisations to adopt AI through demistifying the approach, building trust and reinforcing the value it brings to organisations. I, for one, look forward to building my knowledge and continuing to develop the capability of my team to make the artificial a reality.

The misconceptions of AI

In the excitement and clamour around artificial intelligence, some myths are being perpetuated that give a false impression of what it can do, as Aji Ghose **explains**

Scientists claim that artificial intelligence (AI) is the most profound 'general-purpose technology' of our era, a harbinger of progress and growth akin to the discovery of electricity or the invention of the steam engine.

AI is everywhere these days. Once a concept visited only by science fiction authors, these two letters are now omnipresent in our environment. McKinsey's AI adoption report estimates its global economic impact will reach $13tn by 2030; companies that embrace AI will double their cash flow. Unsurprisingly, businesses are scrambling to develop their AI strategies, and work out how best to make use of this exciting new field.

In the excitement to understand and adapt to the changing landscape, however, numerous misconceptions have arisen around AI's nature, abilities and implications. These threaten to prevent businesses from unlocking the full potential of AI and hinder its uptake.

"Businesses are scrambling to work out how best to make use of this new field"

AI is unbiased

The popular media image of androids is of unemotional, decision-making machines that use pure, cold logic to weigh the options and arrive at a course of action that is rational and free from the discriminatory biases that pervade human judgements. Contemporary research, however, shows that AI systems can perpetuate – and even amplify – gender and racial discrimination. Where would an artificial intelligence pick up such a human flaw? The answer lies in its training.

Most AIs are trained to perform their tasks by being exposed to large volumes of data. By extracting the relationships between characteristics of the training data and the end outcome that represents the decision the AI is aiming to emulate, the AI eventually generalises a set of rules that allows it to perform its function. In this sense, it is merely generalising relationships that exist within its training data and extrapolating these to new information when making decisions live, in situ. So if there is bias in the training data, this will be expressed in the AI's functioning.

Given that biases are part of the human experience that generates data, this is a real concern, and something AI practitioners should keep in mind when training AI systems.

Deep learning is synonymous with AI

Almost all of the visible and highly touted breakthroughs of the AI renaissance, such as image and voice recognition, have been powered by deep learning – an AI-training methodology that is the culmination of a series of smaller breakthroughs in the parent field of neural networks.

Neural networks are themselves an example of the tendency of AI research to adopt and drop algorithms rapidly. Where once knowledge-based systems devised by costly human 'knowledge engineers' represented the peak of AI practice, neural networks – particularly those incorporating deep learning – have led the charge recently.

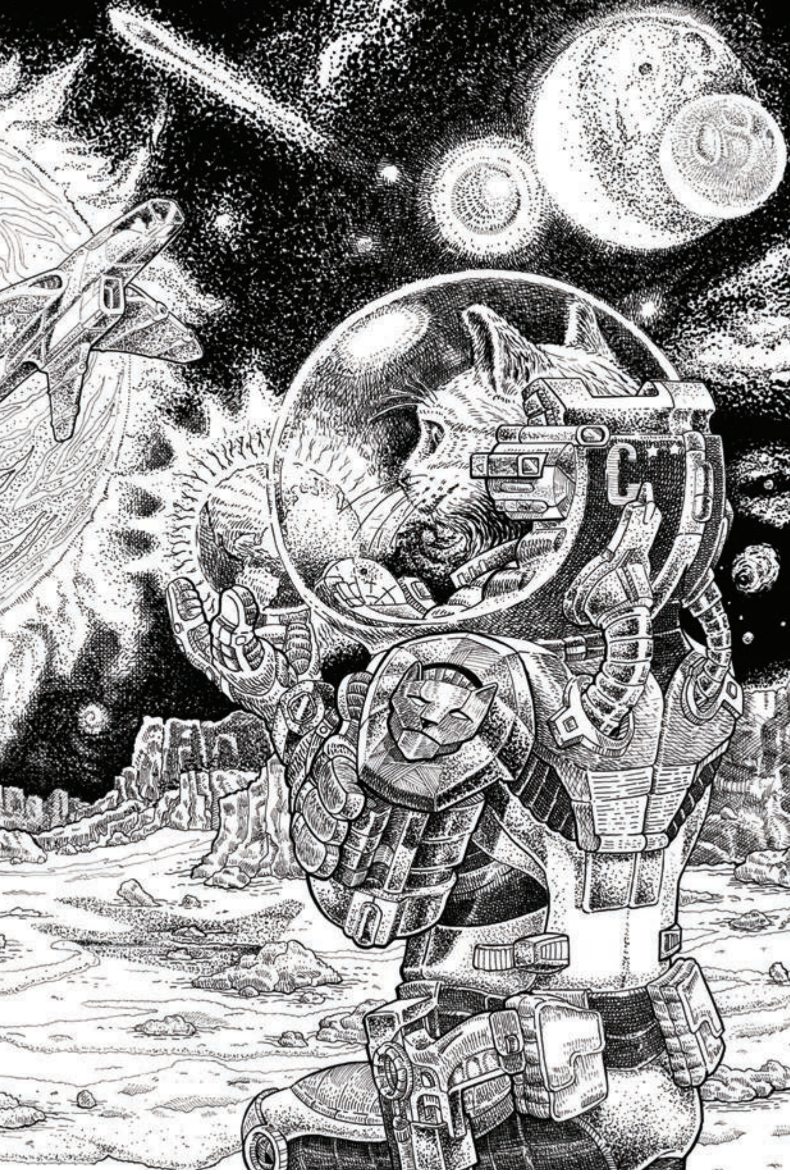
The success of these algorithms, made possible by the explosion of computing power available to AI researchers, has led to the term 'deep learning' entering general conversation. This, in turn, has created a perception that deep learning and AI are one and the same thing, which is an oversimplification.

While deep learning is an undeniably successful learning strategy in specific problem domains, contemporary scientists believe that AI will require dozens of unique techniques working in unison.

The US and Europe are AI leaders

In Kai-Fu Lee's most recent book, *AI Superpowers*, the obsession with American and European AI superiority is questioned in light of the meteoric rise of China's thriving AI ecosystem.

Lee is well positioned to argue this given his pioneering work in AI, both in academia and as an executive at Microsoft, Apple and Google China.



He gives a range of insights into the diverse cultural, governmental and scientific factors illustrating why China is poised to emerge as a new world power in AI.

Unlike in the West, the growth of online-to-offline retailing in China has led to services – such as WeChat – that don't merely exist in an online world. Owned by tech giant Tencent, WeChat has evolved from China's answer to WhatsApp to an all-in-one app that lets users order food, hail rides and stream content, as well as a wide range of real-world services such as hiring a babysitter.

This vibrant ecosystem of services enables the accumulation of the world's largest and most interconnected dataset, giving a 360-degree overview of consumers' preferences and behaviours. This information is a goldmine for data-hungry AI algorithms that increasingly need more data to improve performance.

This gulf in rich and large consumer datasets will only increase between China and the West, paving the way for China's dominance in the world of AI.

Human-level AI is around the corner

AI success stories abound, and the modern consumer has unprecedented access to powerful AI with uncanny abilities to understand speech, recommend films and even diagnose illness. AI has come so far in the past few years that it's only natural to assume that human-level AIs will be among us soon.

The reality is, however, that while AIs have displayed remarkable feats, those attainments have occurred within tightly defined problem domains. Most of the 'AI achievements' reported in the media – for example, Google DeepMind's Go-playing bot, called AlphaGo – are not AI breakthroughs, but are extraordinary engineering feats using innovative concoctions of existing techniques. While AlphaGo and its even more powerful successors can out-compete the very best human players, they would be less able than a five-year-old to distinguish and identify simple geometric shapes.

The AI boom is exponential

AI research has already experienced a series of hype cycles, with prolonged periods of funding cuts. Is another AI winter about to hit us in the near future? Given the pace and volume of venture capital cash flowing into AI start-ups these days, it is very likely that many of these companies are significantly overvalued.

Unlike in the past, however, we now have a plethora of transformative real-world business use cases that depend on deep-learning technologies, from self-driving cars to cancer-detecting 'bots'. So although the AI hype is likely to dampen over the next few years, progress is expected to continue at a slower pace.

AI's many triumphs are testament to a field that has come a long way since its inception in 1956. While its current capabilities are impressive, there's still a long way to go before we see the emergence of artificial general intelligence matching human-level intellect.

Significant progress is being made, not only in the West, but in China too, and a wide variety of algorithms are contributing to the successes of AI. Careful attention is required to ensure that the AI systems of the future are unbiased – and, while the explosion of activity may recede somewhat, the future of AI is bright.

Aji Ghose is head of research and analytics at Sky

The buzz on the street

Founder and CEO of Streetbees Tugce Bulut **talks to** Jane Bainbridge **about algorithms, data collection and monitoring the mood of the nation via its army of 'bees'**

Tugce Bulut started her career as a strategy consultant but, when working with clients, she repeatedly found data quality a problem. So, to meet her need for qualitative insights at scale, she ditched her job and set up artificial intelligence and tech-based market research company Streetbees in 2015.

How did you build the technology behind Streetbees?

The hardest bit was formulating exactly what our clients needed. When I first started, we didn't build in technology for about nine months. We did it all manually to see if it worked – we used WhatsApp to distribute and Google to analyse the data. We didn't even have a dashboard.

Initially, every algorithm was being run by a data scientist, whereas today we've automated that. We now have 1.2bn data points in the database that we analyse. We built the team of machine-learning researchers, who invent new algorithms, a few years after we started the business.

How has this developed since?

We are training our own deep-neural networks. We are teaching a machine to think like a human; it doesn't have to see previous examples – from the training it can understand open text and categorise things.

We build our own algorithms and our own ontologies – a lot is based on university psychology research. Now the machine can recognise an emotion as loneliness or fatigue even though you don't use those words. This is our Always On global platform giving clients continuous access to real people – our bees.

How do you ensure you have the right cross-section of 'bees'?

Obviously, a lot of young people jumped on board. Over time, we had to go offline, on the ground, to

balance. We had ambassadors, of all ages, and they distribute our cards. We did a lot of offline in territories where online penetration is low, such as the Philippines and Africa.

Do they have to give you a certain amount of information about themselves when they sign up?

We get it over time. Every piece of information a bee shares with us stays in a single database. So, if we were researching food delivery and you told us about what kind of food you order, how often, and so on, and then we do another research project, let's say for a food manufacturer, we already know your delivery-food profile. We can use that information to shape the targeting or to inform our clustering analysis.

So, if you're doing work with a client, you can hold that data for another client?

Streetbees owns the data. We never use a dataset connected to a client for another client as a dataset, but we flatten all the data – if you took a photo of your food delivery, that image is a data point in our database. So, if another piece of research also refers to that one data point, it uses that, but no-one would use an entire dataset.

How do you ensure the information is easy for clients to access?

They might be getting a monthly report where we cover their key questions and the changes around that. With the long-term clients who have multi-year subscriptions, we deploy resources – some of our employees are based in their offices full-time, working with their teams.

Initially, we thought we'd use existing dashboards, but those were built for quant-numbered research and were losing all the richness. We built our own systems where you have a quantified graph, that was extracted from open text data, and if you press on one of the bars, we show you the images that data came from. So you never lose the context of your quant and statistical analysis.

What is your bee retention rate?

We have about 65% annual. In most panels it's less than 1% active each month; for us it's 50%.

What are the bees' incentives?

There are three ways it works. We pay cash – if you took a photo of your coffee for us, we might pay you $1. The second is we donate – bees choose a charity from our list and we donate if they contribute to the research. We also sometimes give bigger rewards. We run the global research for college rankings, collecting all the data for the programme with hundreds of thousands of people responding. In that case, we have some big rewards.

Is there a risk that cash introduces bias?

It's always been a risk in research. That's why the incentives systems change, depending on the type of research. If we are doing a political poll, for example, we won't pay. We also have very strict data-quality control. If someone goes above a certain level of logs in a day, they get flagged.

Does this eliminate bots?

When someone registers, there is a triangle of checks we do: device ID, phone number – we send you a text and you have to confirm your number and location.

We also run checks on all our researchers' images against Amazon and Google libraries. If it matches, it's an automatic rejection, so you can't cheat. We eliminate a lot of users.

What are your future priorities?

We discovered from our database that 75% of human behaviour around consumption decisions in FMCG categories is explained by your immediate context and emotions. The contribution of demographics or your claimed behaviour is only 25%. We want to turn this into an ongoing, non-stop observation of why people do what they do, with consequences beyond FMCG into health.

We've collected data on how people feel for four years – by geolocation, by employment, by the food you're eating. We can use that data for mental health and to predict the economic wellbeing of a country. This year, we are doubling down on connecting desires and emotions with consumption choices, and mapping that geographically.

We are also interested in the older age groups' service needs – it is a massively underserviced market and it holds a big chunk of the world's wealth.

What about the ethical issues in this?

When GDPR came about, we were already following those rules. It's privacy by design. Users know that they are giving us data for companies to develop the right products for the market. They know we are compensating them for that.

They still have the legal right to be forgotten – we give this right globally, not just in the EU. And we always aggregate the data, it's not individual. Our data cannot be used for advertising or targeting purposes.

How to avoid wasting research

When the financial crisis started to bite in 2007/08, I was working on a project focused on the future of environmentalism. Just a year before – and for the first time – the environment had overtaken the economy as the most important issue facing the UK in regular polling.

At the time, a significant number of consumers were happily paying more for products that didn't harm the environment, but many commentators expected the green movement to subside in the face of financial pressures. Instead, green behaviours became even more widespread because of the desire to minimise waste and so save money.

I was just a couple of years into my career, so minimising waste was drilled into me – but when we talk about how our industry is changing, we often default to how studies must be run faster and cheaper. We rarely put the same effort into thinking about minimising waste, and this misses a huge opportunity.

Numerous studies have shown that most advertising – possibly up to 89% – is not recalled. In the research industry, the most recent Grit GreenBook report found that half of businesses don't promote market research to broader audiences beyond the commissioning client. Even in individual research studies, large sections of surveys and data sets will often go under-analysed and under-used.

Here are three ways that we encourage our teams to avoid waste when it comes to research and insights:

Upcycle your data: most research studies are focused on a single topic or problem, but almost all of them will carry the same demographic questions each time. That gives researchers a significant opportunity to combine and re-use existing studies to identify entirely new insights about demographic groups (within GDPR guidelines).

At a previous company, in the depths of the recession, our CMO asked us to evaluate a potential new target demographic, but with a budget of precisely zero to commission new research. We gathered all of our recent studies and, rather than look at them 'vertically' – through the lenses of their individual objectives – we looked at them 'horizontally'. We took that audience definition, recreated it from the demographic questions attached to all our surveys, and looked to see what we could understand, more broadly, about that audience across our different studies. Say you have a survey about how video consumption is changing over time and another about shopping habits. They'll tell you a lot about each individual topic, but why not just look at 45- to 65-year-olds across both data sets and see what you can learn about their lives more broadly?

"When we talk about how our industry is changing, we often default to how studies must be run faster and cheaper. We rarely think about minimising waste"

Learn to 'question storm': I've talked about how data-heavy companies will often have all the answers but that researchers need to have the right questions to fully realise the benefit of that ocean of information. Asking great questions is a core skill for writing effective surveys – but building on that to consistently think of theories and questions to explore outside of the original scope of a data set is a very valuable capability in which any research team should invest.

Broaden access to research: so many of the best questions and hypotheses will come from people outside of a study's original stakeholder set. Invest in or build a process for allowing anyone to access research whenever they like, and promote it across your business. By ensuring that anyone in your organisation can find, browse and comment on research, you maximise your chances of finding new questions and angles through which you can interrogate past data.

The psychology of paying

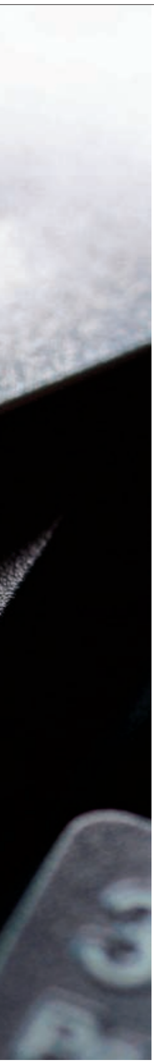
Using plastic is more common now than cash; but how does the method of payment affect shopping behaviour? By Jane Bainbridge

A wad of cash – once cherished by some as the ultimate symbol of wealth – is losing favour as we move to an increasingly cashless society.

In 2006, 62% of all payments in the UK were made with cash, but that was down to 40% by 2016 and is predicted to fall even further – to 21% – by 2026, according to the trade association UK Finance. It said that, in 2018, debit cards overtook cash as the most frequently used payment method.

Contactless cards were introduced in 2007 and these payments have subsequently become increasingly prevalent – but does a different payment choice affect the way people spend money?

This has been studied by Hong Kong-based academics Eric See-To and Eric Ngai, who considered four main areas: spending behaviour; the psychology of consumption; perceptions of payment technology; and the payment mechanism. In their empirical study, they looked at spending among people in



supermarkets across three types of payment: cash, credit cards, and stored-value, contactless smartcards.

In previous research, the source of money (cash, bank account and so on) and the payment process have both been shown to influence spending. For credit cards, it's not clear whether it is the payment process – the absence of cash – or the source of credit card money – the credit factor – that affects spending. In their paper, the authors point to real-world data showing that the mere expectations of a specific payment by credit card can elicit significantly higher spending than an expected cash payment.

The researchers chose supermarket purchases for the study because they are frequent and, invariably, for 'lower involvement' items. Infrequent and/or high-price items complicate the purchasing process.

The research involved real transaction and survey data collected through six large supermarkets in Hong Kong. In total, 1,200 people took part in the survey, with the data collected based on their receipts post-purchase.

People's perceptions of security and convenience are central factors in what method of payment is chosen. See-To, who is research assistant professor at the Department of Computing and Decision Sciences, Lingnan University, Hong Kong, says: "All things being equal, people will choose a payment method with higher security, especially for higher-value items.

"The effects are not as strong for lower-cost items, and perceived convenience may overcome security concerns. Our research shows that the contactless payment process has a negative effect on perceived security and a positive effect on perceived convenience. The credit card payment process – as people are already very familiar with it – has no effect on perceived convenience, but does make people feel more secure with a signature required."

They found that people tend to spend more when they pay with a method that postpones payment (cards), than when they pay immediately (cash). "The delayed payment will lower the subjective painfulness of the payment process, and so is associated with a higher willingness to pay/ consume," adds See-To.

The research also found that credit card payments result in a weaker memory of purchases made. So does that mean people are more reckless with credit card spending? "Yes, we think so. A weaker memory is one factor leading to more spending. The memory issue translates into a less accurate mental account of one's wealth, and that may lead to less-than-optimal personal financial management."

"The credit card payment process has no effect on perceived convenience"

One factor that comes into play when paying for something is 'memory error' – the difference between the real amount spent and someone's estimate – which measures the objective accuracy of the person's memory of the transaction.

When it comes to the psychology of consumption, most people don't like parting with their money, although the 'pain of paying' varies with the payment technology.

This research found that the payment mechanism doesn't affect memory error, but it does affect preciseness – which is related to people's awareness of spending. A lower level of either preciseness or memory error can decrease payment pain. The payment process can moderate payment pain, but the source of money can't.

The source of money also doesn't affect perceived payment convenience and is not related to spending behaviour.

As we move towards a cashless society, what are the implications for retailers and financial services organisations? "Retailers should be aware of the moderation effects of the cashless payment process on consumption when formulating their strategies towards different payment options. With the move towards cashless, as part of a bigger trend of fintech applications, financial services organisations should be aware that there may be additional and different credit risks to be managed."

The study also has practical implications for banks, says See-To, who believes they should focus on simplifying the payment process, instead of giving more credit or lending (both are related to the source of money).

"While the source of money may increase the budget of consumers, it may also lead to overspending. The simplified payment process, instead, can stimulate spending without increasing consumer credit through the source of money."

People may think that the source of money is what will most affect spending behaviour, but the payment process is more important, adds See-To, as it is that which moderates the pain of payment, and hence the willingness to pay.

'An empirical study of payment technologies, the psychology of consumption, and spending behaviour in a retailing context', Eric See-To and Eric Ngai, *Information & Management*, 2018

The devil is in the detail

In the past few years, the field of psychology has suffered several blows to its reputation, as many of its well-known, established findings have not been replicated in recent studies. This has led to big, wide-sweeping headlines that miss several important points:

- Many studies for specific behavioural science concepts, such as framing and anchoring, have been successfully replicated, sometimes finding even stronger effects. These positive results are seldom reported, however, because good news doesn't sell
- Headlines often highlight the findings of large-scale replication studies that analyse a wide range of psychological findings – most of which are unrelated to applied behavioural science
- Our understanding of behavioural science can be deepened and strengthened, rather than weakened, by replication failures. This is often when we learn that tiny, contextual differences or nuances can affect the outcome in unexpected ways, frequently overlooked by the headlines.

So let's look more closely at the replication studies conducted recently. The first Many Labs replication project, led by Brian Nosek in 2013, was a much larger and more robust study than the originals. It found that effects such as anchoring, gain versus loss framing, reciprocity and sunk costs could be replicated. In fact, its findings on anchoring revealed even stronger effects than the original studies by Amos Tversky and Daniel Kahneman.

In the second Many Labs replication project, Nosek and his team completed an even larger study, attempting to replicate 28 classic psychology studies. The way these were written about illustrates my second point. Headlines focused on the fact that 'only 14' of the 28 studies could be replicated. However, the majority of the studies tested were looking at much broader findings from psychology, such as morals, personality, trolley dilemmas and fate, not relevant to behavioural science.

The third point can be illustrated by looking at a 'snail trail' of linked studies over time, allowing us to consider the impact of contextual differences on behaviour.

Fritz Strack's original 1988 study on 'facial feedback' (smiling your way to feeling better) involved asking participants to rate how funny a set of Far Side cartoons was while holding a pen in their mouth. Half the participants held the pen with their teeth, forcing their mouth and face into a smile. The other half held the pen with their lips, forcing their face into a frown. The 'smilers' rated the cartoons marginally funnier than the frowners.

In a 2016 replication of the Strack research, Dutch researchers Wagenmakers *et al* ran a study across 17 locations and involving almost 2,000 participants. On average, researchers found no facial-feedback effect, but Strack argued that the replication had altered important aspects of the experiment design and context. In the replication study (unlike the original) a camera had been directed at the participants. Strack believed that being filmed may have interfered with their emotional responses.

"Our understanding of behavioural science can be deepened and strengthened, rather than weakened, by replication failures"

In 2018, another replication of Strack's study was carried out by Noah, Schul and Mayo. This version tested whether or not the presence of a camera made a difference. Researchers were able to replicate Strack's facial-feedback findings when no camera was present, but unable to do so when it was present. This illustrated that small changes in context can make a difference and that a single study does not 'prove' or 'disprove' anything.

Implications

- Science is an evolving, dynamic process, and findings are never black and white. Scientific knowledge is indicative and provisional; we can never say anything is 'proven' – in fact, scientists try to disprove a hypothesis rather than prove it

- It is valuable to take the time to delve into the detail – small contextual differences and changes – to get an accurate picture of human behaviour

- Replication studies, particularly 'failed' ones, can tell us more and enhance our understanding of the science – not the opposite

- The replication studies in psychology are quietly strengthening many of the most important findings in behavioural science, especially those that regularly feature in a good practitioner's toolbox.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Activist researcher

Few young researchers are championing inclusion to the degree that Momo Amjad **is. With an MRS award secured and a new job and diversity project in motion, she talks to Jane Bainbridge about trouble-making, privilege and encouraging the marginalised to join our industry**

When Momo Amjad was named Young Researcher of the Year at the MRS Research Live 2018 awards, it was, to a large degree, because of her diversity work, and her desire to make market research a career open, and of interest to, people from all walks of life.

As a market researcher and activist, Amjad has been immersed in inclusion for some time, but admits that she is still learning. Recently, she had her own privileges checked while reading an article about disability inclusion.

"I read about how disability rights were not about accessibility," Amjad explains. "I was very shocked – every disability campaign I've seen has been about physical accessibility. But this article argued that it's not about being able to get into the room, it's about what then happens in the room. I've been working on diversity for years, but it was a wonderful moment for me when I realised I have more to learn as well."

Understanding the issues, scrutinising assumptions and never resting on our laurels are essential as we – as individuals, employees, bosses and business owners – move to a more inclusive future.

In love with research

Amjad's background means she has a better understanding than many of the barriers that can prevent access. "My family are fundamentalist religious and, when I was 17 years old, they told me I could either do a law degree or get married to my cousin," she says. "I ended up doing almost three law degrees to buy myself time and figure out how I could get out of that situation."

It was through marrying someone – "as a way of trying to protect my rights" – who worked at strategic insight consultancy Flamingo that she came to market research. After taking up an internship at Flamingo-owned Kiosk, she left the bar.

"I arrived at the Kiosk offices and completely fell in love with the research industry – they offered me a job within about a month of my internship. That was really validating; I not only enjoyed the work, but I was good at it too.

"That was my entry to the industry. Lots of people think it's a bit of a sad story, but I find it really empowering – I was able to come back from it and have these opportunities."

Diversity project

When Kiosk closed, Amjad moved to Bamm and her inclusion work really took off. She led the Diversity research project, in collaboration with the Diversity Taskforce, looking at why black, Asian and minority ethnic (BAME) youths don't enter the creative industries. She helped develop a methodology to research this, training people from within the community to be the interviewers.

"We trained about six 18- to 20-year-olds to go back into their communities and interview five 12- to 18-year-olds each. One of the hypotheses was that young people, especially BAME ones, are not influenced by their families as much as generations before. We found the complete opposite; parents were very persuasive – there's still the prestige job pushed onto young people. Also, a lot of teachers just weren't aware of these [creative] industries. Information drives passion –

"Teachers just weren't aware of the creative industries – you can't be passionate about something that you don't know about"

you can't be passionate about something that you don't know about."

Amjad says the research showed that young BAME people looked at the creative and market research industries and saw they were "full of white people", and wondered if they would fit in. "That's one of the reasons they discounted the creative industries from the outset."

As a result, one of the project's recommendations was for earlier intervention in schools.

"Their decision-making doesn't cement itself until A level, so there is a lot of scope for intervention up until that point. It's not about glamorising it, but about showing other people of colour in that industry," says Amjad.

Marginalised people

As well as exploring inclusion for the industry, she set up Bamm's Panorama internship, aimed at helping people from refugee backgrounds come into the industry. Amjad was keen to broaden the company's internship opportunities so they weren't just going to people who already knew someone in the agency.

"I thought it would be interesting to offer internships to more marginalised people – people of colour, or from poverty-stricken backgrounds," she says.

Amjad then came across Breaking Barriers, which helps refugees find employment, and worked with the charity to give people on its books the right skills and the opportunity to do a three-month internship.

So, what has helped Amjad most in her career?

"Trust – having my team members and senior team members trust me. For example, Bamm had never done lay ethnography before and there were lots of concerns about it. It ended up working wonderfully because someone trusted me enough to say go ahead and do it," she explains.

"I find it really challenging, as a person of colour, to wait around for the more privileged to give me opportunities, when I could be creating them myself. Knowing I'm in a place that allows me to do that unhindered is wonderful."

Amjad is now embarking on a new phase of her career, having recently taken up the position of strategic researcher at The Future Laboratory.

In her new role, she is starting to formulate a research project to look at the future of diversity, and where it's heading for the next generation of consumers. Currently at the recruitment stage, the project will involve talking to innovators and diversity experts – "not just diversity officers in their companies, but actively lobbying, or making some kind of push into the conversation in a more progressive way".

Power of the story

Amjad's aim is to produce articles and blog posts about what the future of diversity looks like in different sectors. "Whether that's what happens when you're in the room, or the genderless office and what that could look like – how different organisations and companies are implementing this, and what Gen Z wants from diversity," she adds.

While the diversity and inclusion conversation "feels very acceptable" for some people, Amjad believes others still need more persuasion. Clearly, she'll be busy working on the latter group – and now has an award under her belt. How did she feel when she won?

"I was very shocked. I wasn't expecting it. I was very truthful in my application about my experiences and was nervous about adding those personal details.

"I was having more conversations with our diversity lay ethnographers and – seeing those results come back in – I saw the power of the story I was trying to tell.

"For them to see that I'd experienced these things and still have the outcome that I wanted, was very valuable for them. Winning the award was incredibly validating.

"Obviously, as a person of colour, it can be really hard to find acceptance in predominantly white spaces – especially if you're Muslim, an activist or a troublemaker."

Part-time leader

Whether it's agencies establishing four-day weeks or maternity leave promotions, flexible working is coming of age. Here Jane Rudling **writes about running a business part-time**

As the managing director of Walnut Unlimited and a partner in the Unlimited Group, I have a challenging and fulfilling job. It sometimes surprises people that I work part-time, and have done for more than 20 years – but this may be the norm in the workplace of the future.

When I joined the company (or rather its predecessor) in 1993, I worked full-time, as we all did. My first child was born 21 years ago, at which point I started working part-time, three days a week. It wasn't the norm then, and I felt some pressure to justify myself and my working arrangements.

As part of negotiating my reduced hours, I agreed to a cut in my full-time equivalent salary. That's not something we would ask someone to do now, but it shows there was some initial scepticism as to whether it could work. We agreed to an initial three-month trial and it was up to me to demonstrate that I could be effective three days a week.

Naturally, clients demand a high level of service, whether their account manager is full- or part-time. In my experience, flexibility is key. In the same way that agency life sometimes demands that we work in the evenings or at weekends, it is also sometimes necessary to swap working and non-working days – or to take that call or respond to an email on a non-working day.

It's about managing workload, and we all know how to do that. For me, it's key to work with a supportive team that I, and my clients, trust when I'm out of the office. It is also worth remembering that clients are people too; as long as their work is delivered to a high standard, they are happy, whether you are in the office three, four or five days a week.

As my children grew, I gradually increased my hours, and now operate as 90% of a full-time worker – although it does not always feel like that! I am not alone. About 20% of our employees work part-time: men and women, across all levels, from managing director to admin staff. This applies to parents and non-parents; while most of our part-time workers are mothers of young children, we have fathers who work part-time and some employees without children who work fewer hours so they can pursue interests outside of work. Recent joiners work part-time, as do three employees who have each been with us for more than 25 years.

Part of our human-understanding ethos is that we don't think of a 'work-life balance' – it is all life. Our employees should not be asked to choose between a career and a fulfilling life outside the office. The days of everyone sitting at their desk from 9am to 5.30pm, five days a week, have gone. Parents in Walnut Unlimited appreciate that they can work part-time, have a fulfilling career and be promoted on merit – as they should.

"We don't think of a 'work-life balance' – it's all life. The days of sitting at a desk from 9am to 5.30pm, five days a week, are gone"

I was promoted to managing director while working part-time and, subsequently, to insight partner for the Unlimited Group. My working hours were not even discussed, as I had demonstrated I could work at a senior level part-time. I am expected to manage my workload and rightly so.

I can honestly say working part-time hasn't been an issue for me. There was a more general fear (from me and others) 21 years ago that I wouldn't be able to service my clients well if I was not there all of the time, but that's never been a reality. More and more of our clients are appreciating part-time working, and it's accepted that work can be covered as well (if not better) by multiple minds. There is a need, as in any job, to juggle commitments and allow for a degree of give and take. And there is always plenty to do – it's all about setting priorities.

Naturally, there have been challenges along the way. When I first started, there were issues over self-worth and self-doubt about whether I could make it work. The phrase 'part-timer' was used by a few colleagues to suggest a lack of commitment. I guess I worked extra hard to prove a point.

I think the biggest concern is the effect my reduced hours might have on others. Meetings are sometimes arranged on a day when I'm out of the office – it's important not to take it personally. I might need to ask for a meeting to be moved or to find a way of giving my input in advance and being updated afterwards. A client might have an urgent request and my colleagues will have to decide whether to handle it themselves or give me a call. It can be difficult on occasion, as I don't want to slow the business down – and I certainly don't want to make extra work for anyone else.

So here are my tips on working part-time in a senior role:

- Delegation is key – and not simply because it is impossible to accomplish everything yourself. It creates opportunities for others to take on responsibility and accept challenges. None of us is indispensable; think about succession planning. It doesn't make much difference to colleagues if I'm out at a client meeting or on leave – there will be arrangements in place
- We know how to plan when we go on holiday; use the same principles around key staff cover when you are not in the office
- Establish clear roles and responsibilities. People need to know what is expected of them and who to turn to if necessary. Collaborative working is essential and trust is key to working part-time. I have faith in the people I work with; I don't need to be there to make every decision
- Set clear boundaries between work and private life. Establish when is it acceptable to be contacted outside working hours and when it is not. What I choose to do may, as a leader, create a perception that I expect this of others, so it is important to be clear
- Create a supportive environment. A colleague who works part-time should not be asked to fit five days of work into three
- Model the right behaviour. Part-time does not mean less committed. When at work, work hard.

As millennials become a larger part of the work force, flexible working patterns are likely to become the norm. Successful agencies will need to embrace flexibility and create a culture where it works for employees, clients and the business.

5 tips on... asking for flexible working

- **Be brave – the least familiar career path to take is often the hardest because it is out of your comfort zone**
- **Be clear about what you want and, if appropriate, why? Asking for increased flexibility without detail doesn't help anyone. If you need to leave at 3pm two days a week, make that clear**
- **Be realistic – are you asking for something that will compromise the business or put colleagues under pressure. Offer solutions where you think that might be the case**
- **Check the precedent – it's easier to ask for an arrangement if you know it has already been given to someone else**
- **If you are the first in your company/team to ask for flexibility, be prepared. Think about this in a '360' way – deal with any objections while, at the same time, highlighting the benefits**
- **Try to be flexible and be willing to negotiate – if an early leave time clashes with a weekly meeting, offer to be flexible on that day.**

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

How do you identify?

Gender identity is complex. It is defined by the Equality and Human Rights Commission as “the way in which an individual identifies with a gender category”. Based on an individual’s self-perception, it may not match the sex registered at birth. People are increasingly understanding gender in a diverse way, to include non-binary and gender-fluid identities – although this is not always the case – and discussion on the issue generates passionate, sometimes insightful, debates about what the approach should be.

Inclusive National Census 2021

Against this background, it is helpful that the England and Wales National Census 2021 will – for the first time – include a voluntary question on gender identity for over-16s.

There is ongoing testing across communities on the preferred approach, and the specific question wording is still to be determined, but this development is to be welcomed. It underscores how important it is to ensure that all members of society can see themselves reflected in this important data-collection exercise. A similar move is being undertaken for Scotland’s Census 2021, while the Northern Ireland Statistics and Research Agency has identified a user need for information on gender identity.

Information collected through the census is critical. Of course, it is vital that – as is intended – information on sex continues to be collected and to be comparable. But, based on user requirements, the addition of collecting gender-identity information should mean better quality information for monitoring and supporting anti-discrimination duties under the Equality Act 2010. In particular, it is hoped that it can provide official data about the size of the transgender population and a better basis for identifying inequalities, needs, services and support for transgender people. Official census data on this segment of the population should also assist market researchers in weighting samples and meeting quotas in studies where this is required.

> **“Collecting gender identity information should mean better quality information for supporting anti-discrimination duties under the Equality Act 2010”**

MRS approach to gender identity

MRS first issued a Best Practice Guidance Note on this topic in 2016, and is the only research association across the globe to have attempted to tackle this issue. Of course, it is a developing area. Evolving best practice, evidenced societal changes and new privacy frameworks mean an update of the gender identity guidance is vital.

Revision and update of gender identity guidance and suggested questions is a complicated task, which needs to take account of multiple factors, such as:

- the need to ensure there is no conflation of sex and gender identity in question design, analysis and reporting
- differing views across communities on the appropriate non-binary and binary response options for both sex and gender identity
- the design of an appropriate approach that ensures the questions can produce robust data while not confusing or excluding any individuals
- substantive ethical and privacy concerns on collection of special category personal data (which is inherently sensitive) and especially on allowing children under 16 to self-identify on gender
- varied cultural norms and public acceptability of the approach in different countries.

Being complicated does not mean it should not be done. The information is important for inclusion and, if it is to be used for robust research insights, it is equally important that it is asked in the most appropriate way.

As refining our approach continues, some fundamental points remain best ethical practice. Researchers need to ensure that:

- participants can proceed through research studies without being required to tick male or female if they do not identify as such
- participants can easily express their views, which can often best be accomplished by including a write-in box – male/female and other (free field) – or allowing people to self-identify by asking an open-ended question
- the gender identity question is separate from a sex question and, where both are required, consider adopting a two-step approach that covers assigned sex at birth and current gender identity
- a 'prefer not to say' response option is included
- the approach used for capturing the information is tailored to the platform or technique used. Questions and approaches that work in online, self-completion surveys may not be appropriate for face-to-face or telephone interviews.

Finally, researchers must always start by considering whether this demographic information is relevant or necessary. If it is not going to be used, there is no need to collect it.

What next?

MRS is continuing to work with research suppliers and other interested stakeholders in the sector to develop an evidence-based approach to our new guidance. This includes working with the Office for National Statistics and participating in a special interest group to unpick and deliberate on all these issues.

If you are interested in working further with us on developing new parameters for gender identity guidance, then get in touch.

A pioneering approach to ethics and data

The government is increasingly imposing legislative and reporting demands around social issues that it expects the private sector to comply with in the normal course of doing business. Gender pay-gap reporting will shortly be followed by reporting on black, Asian and minority ethnic (BAME) pay performance.

Gender pay-gap reporting has helpfully shone a light not only on pay outcomes, but also on the employment and recruitment practices that may – albeit unconsciously – contribute to pay bias.

In a similar vein, every data breach or misuse that gets reported, such as that of Cambridge Analytica, contributes to an erosion of trust in commercial and governmental use of our personal data. This has consequences, both in our sector, on participation rates, and in the myriad ways people protect their data (opting out, dirtying data, fake profiles and other techniques).

Increasingly, in consumers' minds, there is little to distinguish between high-quality research programmes and perceived 'data farming' exploitation.

Ironically this sector has pioneered ethical approaches to handling sensitive personal data for years. The MRS Code of Conduct is more than 60 years old. MRS identified early the need for a customer data trust mark, to identify responsible use of personal data. Our pioneering idea Fair Data has now had its fourth successful international launch, in Australia.

Earlier this year, MRS launched the 'ADA' programme of support for data analysts, which includes training, networking and awards recognition. Many analysts and analytics business leaders have asked for more help in promoting ethical and regulatory best practice – which is why we will shortly launch not only an updated Code, but also specific guidance for analysts in how to apply it to their work.

MRS is doing so much to empower our sector for the future by helping re-establish the common ground that we call 'trust' – between the public and the data user, in public and private sector practice. I hope you welcome and support these initiatives.

Finally, we go to press too early to reflect the immediate soap opera that is Brexit preparations, so whatever the outcome – good luck.

You can stay up to date on the implications of Brexit on research via our website, which has a dedicated 'Brexit hub': **mrs.org.uk/brexit**

Sector and MRS news

#MRSpride

A new initiative to unite the LGBTQ+ community across the research and insight sector has been launched. The #MRSpride network will kick off on 30 May with an event hosted by MRS, YouGov and IPG Mediabrands. It has been designed to offer a platform for LGBTQ+ research content – from consumer insight to methodological best practice – as well as to elevate leaders who will inspire junior talent in the sector.

Brexit guidance

MRS has published two Brexit and Research guidance notes on its Brexit hub at mrs.org.uk. If you regularly carry out research on EU data subjects and do not have an office in the EU, you should think about whether you need to appoint an EU representative – and, if so, who. The guidance note on appointing an EU representative sets out the issues that need to be considered in making this decision. These are uncertain times for EU nationals and our Immigration Update gives advice on managing and supporting them, particularly through the Settled Scheme process.

Making the most of your membership

MRS membership shows your commitment to research excellence, connects you to a network of 5,000 experts and gives you access to a huge range of specialist benefits

Knowledge Centre

Build your knowledge of digital branding, big data and AI

As a member, you get free access to 50 of the latest business, brand and personal development e-books from independent publisher Kogan Page. You can access the Knowledge Centre via your MyMRS account. From here, you can view the books, as well as regularly updated videos and articles on this user-friendly digital platform. Build your own reference library by bookmarking and signposting content that's relevant to you. This benefit alone represents more than £600 worth of books!

Mentoring scheme

Give your career a boost with the specialist mentoring scheme

The mentoring scheme gives members a framework to develop a broader set of competencies and interpersonal skills. As a member, you can apply to be part of the scheme, which currently has more than 100 active partnerships. The scheme matches members with the support of an experienced professional. Mentoring can help you to review your approaches, optimise your thinking and integrate left-brain analysis with right-brain creative thinking. It is also recognised within the MRS CPD programme.

Specialist networks

Sign up to a range of specialist interest groups and networks

You can become involved in a range of MRS special interest groups. For the analytically minded, there is the ADA Network, which runs regular symposia on the latest analytical tools and techniques. If you are under 30 years old, or new to insight, you can join '&more', which offers a wealth of cool events and networking for anyone starting out in their career. If you rely on demographics in your work, then become part of the specialist Census and Geodemographics Group, which publishes regular blogs and content.

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 Knowledge Centre; 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

Member events

Profession Webinar: Game-based Research Methods
How games and gamification can improve research for buyers, suppliers and participants.
25 April

Speaker Evening: Big semiotics
How 'big semiotics' can detect and decode the social and cultural influences that shape consumer attitudes and behaviour.
9 May

#MRSpride
Inaugural event of a new network connecting LGBTQ+ talent across the sector.
30 May

Speaker Evening: Flexible Working in Research
Panellists will explore the benefits and challenges of flexible working before opening up the debate.
13 June

IJMR Lecture
Live content from *IJMR*, the leading source on new methodological thinking in research.
8 July

Speaker Evening: Generational Stereotypes
How generational stereotypes and misconceptions can cloud our understanding.
11 July

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

Conferences

FMCG Research Summit
How FMCG brands use insight to deepen customer understanding, strengthen brand connection and drive behaviour change.
9 May

Media Research Summit
Discover how key brands are using data-driven insight and audience measurement to maximise audience engagement and influence consumer choices.
13 June

B2B Research Conference
Communication preferences and requirements of future millennial business leaders.
27 June

Training highlights

Understanding and Managing Client Expectations
The process clients go through, from initial research question to after research has been delivered.
25 April

Advanced Statistical Techniques
An overview of techniques, such as factor and cluster analysis.
29 April

Essentials of Quantitative Research
Develop a full understanding of all aspects of the quantitative research process.
30 April–2 May

Understanding the Customer Experience
The value of optimising the customer experience, and typical barriers to overcome.
7 May

MRS Summer School
The ideal training hub for young research talent, with compelling sessions on a range of topics over three days.
25–27 June

Social events

South West Summer Social
All aboard one of Bristol's favourite cider barges for some networking.
7 July

Croquet on the Meadows
Help MRS Scotland smash their SRA counterparts in Edinburgh.
18 July

MRS Summer Party
A night of rooftop networking and fun in London.
25 July

Awards ceremonies

Excellence Awards
Celebrating personal achievements with impact, including the new MRS Fellows.
7 June

7

Cindy Gallop **is founder and chief executive of MakeLoveNotPorn and IfWeRanTheWorld, and former chair of BBH New York**

1 You've been a vocal critic of the lack of inclusion in the advertising and tech industries, and progress remains depressingly stagnant. What's the most urgent issue for businesses to address?
It's very simple. They need to listen to their employees about what is causing them to be excluded, believe them, and act to change those excluding dynamics.

2 Has the #MeToo movement led to behavioural or structural change?
No, because in an industry dominated by a closed loop of white guys talking to white guys about other white guys, sexual harassment is systemic and the culture of harassment is driven from the top. The men at the top have been harassing and protecting their own for decades. Right-minded leadership needs to ensure – and clients need to demand – that agencies are gender-equal or more female than male. Sexual harassment magically disappears in gender-equal environments, because there is no longer the implicit 'bro' endorsement that it's OK to behave like that. And when men interact with women as professional equals, they cease to see them in one of only two roles: girlfriend or secretary.

3 From Trump to tech companies, powerful institutions are facing backlashes. But do we need to be less divided to move forward?
Nothing changes until there is equality of power and opportunity. The white, male founders of the giant tech platforms that dominate our lives are not the primary targets of harassment, abuse, sexual assault, violence and rape – so they don't design for it. It's the people most at risk who design safe, unifying experiences. Put more power and opportunity in the hands of those most at risk, and they will design for – and drive – unity.

4 Why hasn't there been a Harvey Weinstein moment in advertising?
Everyone – women and men alike – is too terrified to talk, because the powerful men doing the harassing are the gatekeepers of everything. That's why I want everyone to know I'm never giving up. To the powerful men who think you've gotten away with it: you haven't. And to the powerful women who, sadly, have enabled powerful men – you haven't gotten away with it either. One day we will break those stories.

5 Do we need to move away from emotion and focus more on the evidence that supports diversity?
Absolutely not. Rational facts and figures don't work. If they did, we'd be looking at a very different picture. We are drowning in data that demonstrates diversity is good for business, and the white men at the top don't give a shit. They're sitting pretty, with their huge salaries – why would they rock the boat? They have to talk diversity, but have no intention of changing a thing, because the system's working just fine for them. It's like the old joke: how many therapists does it take to change a lightbulb? Only one – but the lightbulb has to really want to change. Well, in our industry, the lightbulb doesn't really want to change. I don't sell diversity, I make people want to buy it.

6 What's the biggest misconception businesses have about society today?
That older people have no value. I mean that across the board – failure to target the segment of the population with the most money and most desire to spend it; failure to believe that films and TV series centred on older people will find an audience; failure to see older people and their lifestyles as aspirational, and to reflect that in advertising for younger people; failure to understand that hiring, promoting and retaining older workers is guaranteed to deliver better business results. There's a ton of research that businesses choose to ignore, proving how valuable older people are. I go back to my previous point – you can't sell people this, you have to make them want to buy. That's what I'm working on with AARP's Disrupt Aging initiative – to drive home these points at an emotional level, to challenge and change ageism.

7 What's the most important lesson you've learned in your career?
Not to give a damn what anybody else thinks.

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