

impact

ISSUE 38 JULY 2022

Using evidence & insight to make a difference

Up, up and away

How brands can tackle the
fallout from soaring costs





QUANTITATIVE SOLUTIONS

by Schlesinger Group

Online | Mobile | In-Person



Online Surveys

End-to-end solutions to meet your objective, timeline, & budget.



Quantitative Fieldwork

Clinical research, product tests, store audits, and more.



Do-It-For-Me Solutions

Tools, experts, and respondents, all in one place.



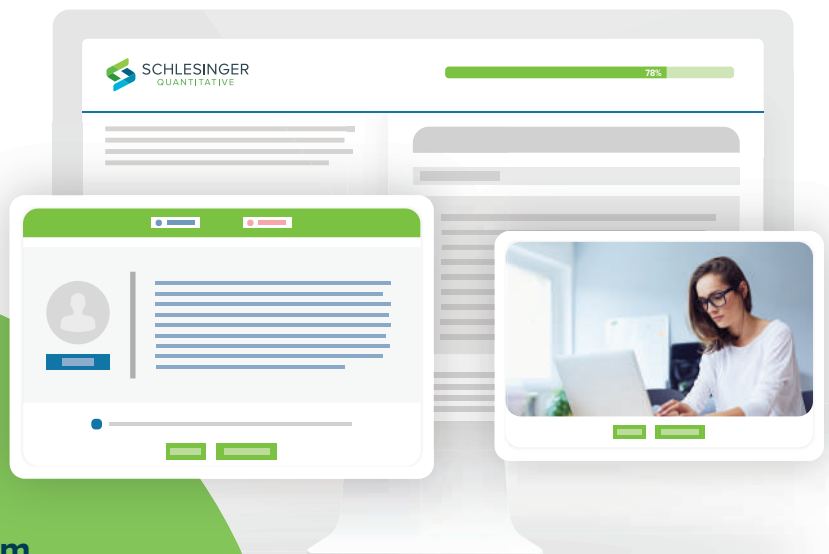
Hybrid Studies

Online surveys combined with traditional quantitative or qualitative methodology and one point of contact.



Global Sample

Millions of deeply profiled and niche audiences in more than 50 countries.



We are your global research partner, anywhere, anytime.

Connect with us:

Quant@SchlesingerGroup.com

EDITORIAL

Editor (maternity cover)
Colette Doyle
+44 (0) 20 7566 1819
colette.doyle@mrs.org.uk

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

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

ADVERTISING

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

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

PUBLISHING

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

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

DESIGN AND PRODUCTION

CPL
+44 (0) 1223 378 000
www.cpl.co.uk

PRINTER

Geoff Neal

SUBSCRIPTION ORDERS AND ENQUIRIES

+44 (0) 845 194 8901
info@mrs.org.uk
Impact is free to MRS members.
Subs: UK £50pa,
overseas £60pa

ADDRESS

The Market Research Society
The Old Trading House
15 Northburgh Street, London EC1V 0JR
+44 (0) 20 7490 4911
www.mrs.org.uk

All content in *Impact* is editorially independent of any sponsor involvement.

CREDITS

cover istock.com / leezsnow
P10 istock.com / Riccardo Lennart Niels Mayer
P11 istock.com / estherpoon
P12 istock.com / nevodka
P13 istock.com / martin-dm
P14-15 istock.com / Olivier Le Moal
P20 istock.com / rvinladies
P22 istock.com / agcuesta
P25 istock.com / t-blewulis
P26 istock.com / Martina Birnbaum
P28 istock.com / JRLPhotographer
P32 istock.com / Nicholas Free
P36 istock.com / SHansche / AndreyKrav
P37 istock.com / D. Lentz / RudyBalasko
P42-43 istock.com / danleap
P44-45 istock.com / Serdarbayraktar / Weedezign
P47 istock.com / yacobchuk
P50-51 istock.com / designer491
P52-53 istock.com / FangXiaNuo

Spread the word



When I took over this role to cover for the permanent editor's maternity leave, journalist friends were initially a tad sceptical, given that it involved working on a market research magazine. If they weren't that impressed, it's because, whenever the term pops up, they – and a lot of other people besides – tend to picture a grizzled, white-haired gentleman with horn-rimmed glasses, brandishing a clipboard.

It's a real shame that the insights industry is associated with such an outdated stereotype, because, as I quickly learned, it has so much more to offer. For a start, it's used by everyone from Lidl to Louis Vuitton and shapes much of our experience as consumers. It also, as the release of the 1950 US census records in April evidenced, provides a fascinating snapshot of history: if you want to delve into the early days of Barbra Streisand, Bruce Springsteen or Muhammad Ali, then look no further.

On a less frivolous note, it helps shape public policy, as was the case with Ipsos' much-lauded Covid-19 surveillance study, REACT. This influenced government decision-making in such key areas as the rule of six and the regional tier approach, as well as providing significant learning on vaccine effectiveness and identification of the different variants of the disease.

In the commercial arena, the influence of market research knows no bounds, it seems: at the Market Research Society's (MRS's) customer and user experience

summit, we heard how insight professionals and senior researchers at NatWest Group worked in tandem to improve their customers' understanding of investment opportunities via the bank's website. In a similar vein, when City Football Group clubs wanted to get a window into fans' motivation and needs in order to translate that into better match-day experiences, they turned to journey mapping to achieve this.

It appears that market research suffers from an image problem; as Florian Heyden, consumer & marketplace insights manager at Nestlé, put it at a conference earlier this year, market research must "occupy the boardroom" and ensure that it "has the ear of the CEO on a par with other functions, such as marketing and sales". In short, we need to continue to shout from the rooftops about what a valuable contribution it makes to society.

Just as vitally, the sector has to focus on positioning itself as a more attractive option to young graduates and career changers alike. This was the topic of a fascinating study conducted by specialist recruitment agency Daughters of Sailors and supported by MRS chair Sinead Jefferies. At the time, she recalled a pertinent comment by British statistician Professor David Spiegelhalter: "The numbers do not speak for themselves. We imbue them with meaning."

So, as I hand back the reins to Katie McQuater, I leave with a new-found appreciation for the professional insights function – and I'm also pleased to report that I have yet to come across a single clipboard.



World view

09 Global round-up
Telling the story of female teenage Congolese refugees, eco-conscious shopping in China, political sensibilities across rural communities in Europe, and tackling online violence against women in Nepal

14 Spotlight
An investigation into the combination of different research techniques being applied in the post-pandemic landscape

Profile

16 Interview
Julie Abraham, chief executive, Richer Sounds, on successfully battling the perfect storm

Impact report

20 Untethered times
How brands need to get clever to combat the cost-of-living crisis

Features

30 HSBC
A look at how the global bank is making use of insights to help it change focus

34 Tripadvisor
Travel is back and the international review site is gearing up for a return to the new normal

Focus

40 Data analytics
An in-depth review of the 'say-do' gap often found in research surveys

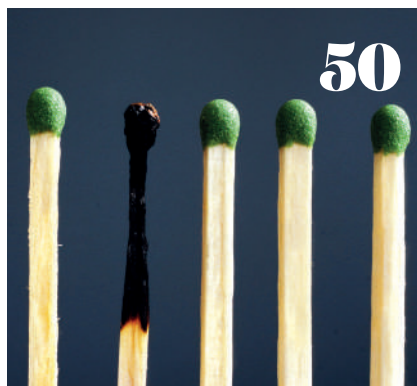
42 Business
How does a dearth of optimism impact on the financial future of brands?

50 Careers
Burnout is common across the professional insights space, so it's important to have a proper plan in place to prevent it

55 MRS
The latest from the Market Research Society

58 In seven
Dr Kenny Monrose discusses the biggest issues facing the UK criminal justice system





Columnists



07

Rory Sutherland
Sutherland is vice-chair of Ogilvy UK. Here, he ruminates on questions of ethnicity and religion as they apply to the research industry



39

Lorna Tilbian
Tilbian is chairman of Dowgate Capital; in this issue, she declares it's time to go back to basics, in financial terms at least



41

Bethan Blakeley
Blakeley is analytics director at Boxclever; she advocates for greater knowledge sharing within the insights community



46

Crawford Hollingworth
Hollingworth is co-founder of The Behavioural Architects; in this issue, he argues that chronological age is not a viable frame of reference



52

Kaleke Kolawole
Kolawole is policy manager at MRS. Here, she explains how social procurement puts the onus on businesses to partake in bettering society for everyone concerned

MADE IN SURVEYS



1,500,000
**Triple opt-in
panellists**



Over 300
data points



Instant Insight
Your results
within 24h



In house
hosting/scripting
(conjoint analysis, max diffs etc.)

London Office: 0207 687 1234 / rfq@misgroup.io



200,000

Panellists
in the UK



500,000

Panellists
in France



100,000

Panellists
in Italy



100,000

Panellists
in Germany



100,000

Panellists
in Spain

MIS | GROUP

www.misgroup.io

MADE IN STUDIOS

11 STUDIOS
IN THE UK AND FRANCE

IN HOUSE NATIONWIDE
RECRUITMENT

Birmingham Office: 0121 679 0105
ukqual@misgroup.io

Newhall Room, Birmingham

All else being equal



I don't know the answer to this question, but I would like your opinion. When asked on a form to state your religion or ethnicity, should you leave the section blank? Or might it be better to lie, or answer 'other'? Or would it be better to tell the truth? Under perfect conditions, I would, of course, tell the truth. The problem is, perfect conditions never exist.

And here's my issue. It seems to me an inarguable law that there must be far more semi-competent or indifferent statisticians among the population than there are great statisticians. If we assume a normal distribution of statistical competence, there will be a left-hand tail of people who are shockingly bad at assessing and understanding statistics, a large rump in the middle of people who are quite poor, then an equally large group of people who are confident enough to be dangerous. Tailing off towards the right will be a tiny number of true experts.

I'm not worried by the people who are atrocious at statistics. When they are wrong, it is easy for many people to spot and correct their errors. What worries me is the profusion of GCSE-level statisticians, because it seems to me a peculiar property of statistical understanding that high, but not spectacular, ability may be worse than none. In statistical questions, it is possible to be confidently and monumentally wrong, yet for the fallaciousness of your inference to be invisible to large groups of otherwise educated people – especially yourself. Here, a little learning really is a dangerous thing. Take the OJ Simpson trial:

“When the prosecution presented evidence that Simpson had been violent toward his wife, the defence argued that there was only one woman murdered for every 2,500 women who were subjected to spousal abuse, hence any history of Simpson being violent toward his wife was ‘irrelevant to the trial’.

“Yet, according to Gerd Gigerenzer, the correct probability requires the wider context – that Simpson's wife had not only been subjected to domestic violence, but rather subjected to domestic violence (by Simpson) and killed (by someone). Gigerenzer writes ‘the chances that a batterer actually murdered his partner, given that she has been killed, is about eight in nine, or approximately 90%’. While most cases of spousal abuse do not end in murder,

most cases of murder where there is a history of spousal abuse were committed by the spouse.”

I don't suppose one person in a hundred would instinctively understand this distinction without having it explained. No-one in the courtroom challenged it. Yet the subtle distinction here affects the jurors' likely inference by a factor of more than 2,200 – from a 0.04% implication of guilt to perhaps 89%.

Wider context also matters in the assessment of DNA evidence. If one in 200,000 people, including the suspect, shares DNA with the perpetrator, you have to consider how that DNA was first used. If it was used to find a suspect (perhaps by trawling a database of two million people) it has little value. If, on the other hand, someone seen fleeing the scene is arrested and found to have such a match, it adds to a reasonable presumption of guilt. Contextual blindness of this kind led to the unsafe convictions of Sally Clark in the UK and Lucia de Berk in the Netherlands.

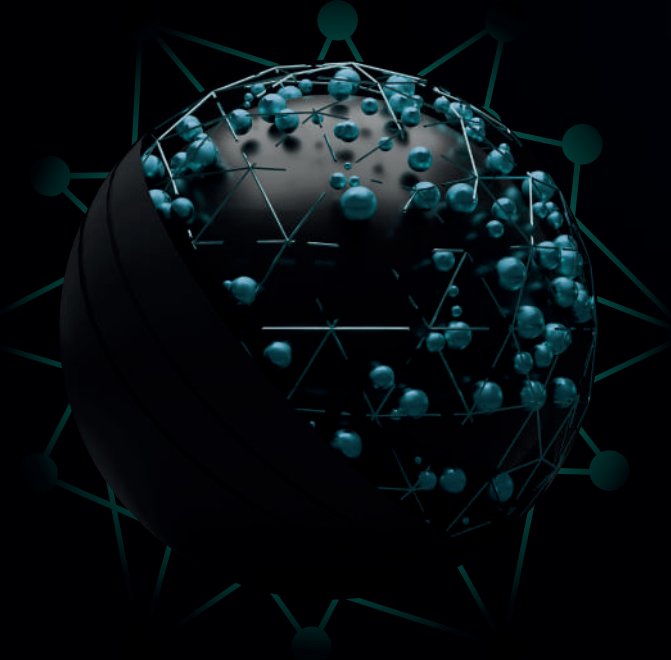
Here's why I am slightly alarmed by surveys routinely containing questions about ethnicity or religion, but that fail to collect enough information to provide wider context. For every valuable finding that emerges, we may end up with 10 spurious findings – spurious correlations, or those that are blind to

the many confounding variables that simply aren't collected.

There is, for instance, a significant correlation between your own personal success and the number of books your parents owned. I have never been asked for that information on a form. This is not to deny racial inequality or bias. It is simply a question of understanding it better. To lump together someone who arrives in Britain as a newly qualified surgeon and someone who arrives in later life with no qualifications simply because they share skin colour is not illuminating – it is misleading. Our selective collection of data risks doing exactly that. The act of averaging also risks blinding us to areas where racial bias is most acute.

Data broken down by race and nothing else will lead us to believe that all inequality proceeds from overt or unconscious bias, while leaving unseen the influence of other things (social networks in particular) that may play an even more powerful role in perpetuating inequality. The practice is largely well intentioned. Whether it is helpful is a different question.

●
“It seems a peculiar property of statistical understanding that high, but not spectacular, ability may be worse than none”
 ●



Global research deserves
more than just translation.

EMPOWER

SPECIALIST LANGUAGE SERVICES
FROM A PASSIONATE, AWARD-WINNING,
ETHICALLY-CONSCIOUS TEAM.

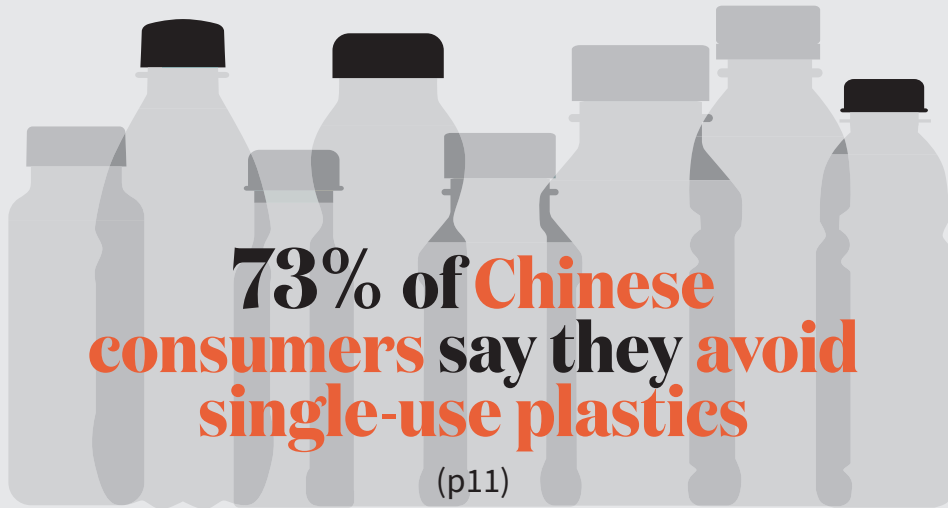


Chat with Ruth & John
for expert advice on
improving your global
research localization
- no strings attached.

ruth.partington@empowertranslate.com

john.temple@empowertranslate.com





73% of Chinese consumers say they avoid single-use plastics

(p11)

●
“One of the hardest parts of being a refugee is the lack of identity”
(p10)
●

●
5,574 online harassment cases occurred in Nepal between 2016 and 2020
(p13)
●

“**Online violence against women** stood out as one of the **main issues**”

(p13)



Europeans in rural places are **57% more likely to feel right wing**

(p12)



●
“Too much division can create worrisome societal cleavages”
(p12)
●

Raising her voice

What are the experiences of Congolese teenage girls as refugees in South Africa?

Amélie Truffert and Rhonda Nicholl explore a recent qualitative study examining the girls' lives



It's hard to navigate being a teenager – and even harder when juggling multiple identities and cultural expectations. At Ordinary Differences, we specialise in gender-related issues. For this project, our goal was to explore the psychological and social challenges Congolese teenage girls face when attempting to integrate into their host country – in this case, South Africa.

In 2021, we followed a group of refugee teenagers, aged 13 to 17, over a period of three months, using digital ethnography in order to hear and see through their eyes their experiences – of juggling multiple identities, expectations and pressures, all while navigating adolescence.

When you look at the media, the representation of female refugees is often the same – they are depicted as passive victims of their circumstances. Their voices aren't heard, and the diversity of their experiences is not being brought to life. We wanted to address this lack of agency and showcase a totally different (and unexpected) side that shatters stereotypical representations of female refugees. Specifically, teenage girl refugees.

What we found were confident, determined and ambitious teenage girls wanting to be heard. They are smart, they go to school, they study like crazy, and they have loads of different interests. They are obsessed with K-pop and South

Korean TV shows. They talk about crushes, share videos on TikTok and think Facebook is for old, boring people. This is not your stereotypical image of a refugee girl that the media often portrays.

They are certainly not passive. Far from it. They want to shape and own their future. They want to overcome the obstacles standing in their way. One of the hardest parts of being a refugee is the lack of identity. This can even make their everyday life seem impossible: for example, some of them cannot sit their final, end-of-school exams because they do not have the correct paperwork. No final exams, no university, no opportunity to follow their dreams. But it also raises questions about their own, individual identity. If they aren't deemed to be Congolese, as they have never been there and don't speak the language, and yet are also not South African because they are 'different', what does this mean? Who are they? This is a question they grapple with every day.

We heard about the bullying they experience at school because they are 'different'. Told that they are not African. That they are too black. And language is used as a weapon, as a tool for exclusion. One of the girls says she feels like an outsider because she can't speak Zulu, so she's powerless to understand what they are saying about her, both behind her back and often right in front of her.

These are just some of the examples of what life is like for them – but they aren't defeated. They rise and continue to shape their future, despite these setbacks. The girls loved having someone listen to them; hear their dreams, but also their frustrations. It gave them the confidence to speak out and to be heard. Now the sky is the limit, and who knows – one day they might even become researchers.

This project was led by the girls. It was raw, direct and in the moment; rather than the girls reflecting retrospectively, we were able to generate feedback as and when it was happening. They ended up telling us about the world through their eyes. This wasn't done with fancy apps or software; this wasn't done spending huge amounts of money or with a prescriptive discussion guide – this was done to turn an over-thought research process on its head, to just reach out to girls.

Thanks to digital accessible tools, we conducted an agile piece of research, and we did it in a way that brought the girls' story to life. They are inspiring young girls, and we look forward to seeing what life brings them as we continue to listen to their stories.

● Amélie Truffert is partner and Rhonda Nicholl associate director at Ordinary Differences



The sustainability paradox

Chinese consumers are environmentally conscious, but does this translate into action on climate change? Joeri Van den Bergh reports

Since 1953, the Chinese economy has been shaped by five-year plans, with social and economic development guidelines. The latest, covering 2021 to 2025, contains ambitious sustainability goals to reach carbon neutrality by 2060. Businesses operating in China are transforming their operations and supply chains to align with the new policies. But how important is sustainability to consumers in China, and how does this translate into consumer behaviour?

Our research has shown that 94% of Chinese consumers indicate that sustainability is important, yet many are not acting upon it. What is causing this paradox? Our figures are based on a study conducted by InSites Consulting, from December 2021 to January 2022, among 802 respondents from three generations (X, Y and Z) in mainland China. The sample was representative for each generation.

An important dimension is the so-called 'say-do gap', where intentions are high, but actual behaviour is low. Our research identified four eco-barriers that are holding consumers back from living a more sustainable life: affordability (sustainable means more expensive); accessibility (lack of sustainable alternatives and information about which products are sustainable); performance (consumers feel forced to make a trade-off between sustainability and performance); and convenience (the perception that living more sustainably requires too much time and effort).

More than 79% of Chinese consumers wish to change their habits and bridge the say-do gap to positively impact the environment. Brands can play an

important role in this by supporting consumers in adopting sustainable habits and by providing 'rewards', fuelling repeated action.

Unilever, together with Alibaba Group, developed an artificial intelligence-powered recycling system. Consumers deposit their plastic waste and are rewarded with vouchers for Unilever products, or virtual 'green energy' points in Alipay's Ant Forest project.

Consumers are already adopting more sustainable habits: 60% of Chinese consumers acknowledge their eating habits impact the environment; 66% mend clothes or repair household items instead of replacing them; and 70% choose holiday destinations that do not require flying but can be reached by train, car or bus.

According to our research, reducing single-use plastic is a key area for Chinese consumers. In fact, 73% indicate avoiding single-use plastics, 69% refuse plastic shopping bags, and 50% no longer buy water in plastic bottles. As for recycling plastic bottles, Chinese brand HowBottle, launched in 2017, has upcycled more than 600,000 bottles into fun bags with a low environmental footprint. In 2019, it launched a rain jacket with Coca-Cola to create awareness among Chinese youth of the impact of plastic waste. The back of the jacket said: "I don't care", which – when wet – changed into "I do care".

Consumers are clearly taking action, yet they believe they are not solely responsible for driving change; 82% feel brands have a responsibility to look after the planet. So, what can brands do?

First, brands can help reduce the

identified eco-barriers and support consumers in displaying more sustainable behaviour. With 48% of consumers saying they would live more sustainably if products were cheaper, affordability is a key factor. To stimulate consumers to reuse packaging, marketing refills at a lower price could help.

Accessibility is another important dimension, with 38% of consumers in our research stating that they would live more sustainably if products were widely and easily available. Ensuring sustainable solutions are available online and offline is a quick win.

Consumers feel forced to choose between product attributes they value and sustainability, the latter often considered a sign of lower effectiveness. Providing reassurance around the performance of sustainable solutions is key.

With the final barrier, convenience, 56% of Chinese consumers say they would adopt a more sustainable lifestyle if it required less time or effort. The challenge for brands lies in marrying convenience with sustainability. Like China's largest electronics recycling company, Aihuishou, which works with mobile phone recycling machines to facilitate handing them in.

Once its sustainability mission and strategy are clear, it is vital for a brand to communicate them to the public. In fact, 84% of Chinese consumers feel brands and companies should be more transparent, and provide additional information about their sustainability ambitions and progress.

● **Joeri Van den Bergh is co-founder at InSites Consulting**

A different country

How big is the political divide between the countryside and cities in Europe? By Liam Kay

For 58.55% of voters in April's French presidential election, the sight of a victorious Emmanuel Macron in front of the Eiffel Tower, speaking with hand on heart as he took up the post for another five years, will have been a relief.

For 41.45% of voters – Marine Le Pen supporters mainly based outside France's cities and in its rural heartlands – this was a worst-case scenario.

France is deeply divided between its cities and its rural areas. It is a trend that has been seen across the continent, from the UK to Hungary, Poland, Italy and Germany, among others.

A Cambridge University study carried out last year by Michael Kenny and Davide Luca, called *The urban-rural polarisation of political disenchantment*, sought to examine the extent of the political divide between the countryside and cities in 30 European countries, including all 27 EU nations, plus the UK, Norway and Switzerland. The study used data from the European Social Survey – which runs every two years – between 2002 and 2018, and analysed individual-level data across the nine surveys.

Luca says fears of a growing divide between the rural and urban populations across Europe loomed large in the reasoning behind undertaking the analysis. "As a social scientist, and as a person who grew up in the countryside, I'm deeply concerned about whether these divides may, in the long term, become highly divisive for society as a whole," he explains. "In a way, a bit of urban/rural divide is expected, and has been a feature of human history. Too much division, however, can create worrisome societal cleavages."

The study found there were striking differences between the populations of rural and urban Europe. Across western Europe, residents of rural areas were, on average, 33.5% more likely to vote than those in inner cities, but 16% less likely to report a one-unit increase in their trust of political parties on a scale of zero to 10.

People living in the countryside were far less likely to engage in political actions, such as protests and boycotts, than their city-dwelling counterparts, and were 55% more likely than people in cities to disagree with the idea that immigration enriches the national culture.

Europeans in rural places are an average of 57% more likely to feel one point closer to the right on the political spectrum when measured on a scale of zero to 10 (0 being left, 10 right).

Luca says the results show the urban/rural divide exists, although he stresses that other predictors of political values – such as age, income and partisanship – are also key predictors of political values.

"Without discrediting the key role

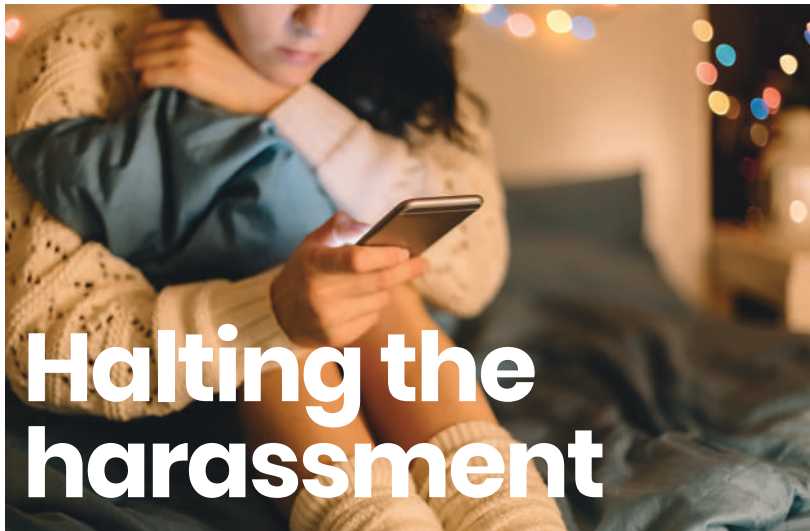
played by these individual factors, our paper shows that geography matters too, and that a full understanding of the role of place in influencing political outcomes is key," Luca maintains.

What could happen if the divide is not addressed? "The risk is that residents of remote and/or declining towns and the countryside will feel increasingly alienated," says Luca. "Similarly, addressing climate change will require bold actions by governments and, often, the costs associated with the 'green transition' are not distributed equally. The *gilets jaunes* protest in France is a very interesting example, where the revolts against the 'Paris elites' were triggered by an environmental policy that many of us would consider sensible."

Luca adds that reforms are needed to address the lack of economic opportunities in more marginal areas and to ameliorate the sense of resentment and growing divergence between those in cosmopolitan areas and those who live in more remote communities. This includes better access to public services and transport in rural areas.

"Governments need to think about measures that either offset higher costs in rural areas, or convince dwellers about the implementation of policies that, in the eyes of many, may not always sound very palatable," he concludes.





Halting the harassment

Cases of online abuse against females have hit an all-time high in recent years. Colette Doyle finds out how the BBC Media Action team in Nepal carried out research into this troubling phenomenon

Online access has had a democratising influence across the world, but the rapidly increasing number of internet and social media users has come at a price, and there has been a corresponding rise in cases of online abuse and violence against women and girls. This can take the form of physical threats, stalking, ‘sex trolling’ and sexual harassment, as well as what has become known as Zoom bombing.

In the South Asian nation of Nepal, digital adoption is high: in January this year, there were around 14 million social media users, up by two million since January 2020. Meanwhile, 5,574 online harassment cases were reported to the country’s Cyber Bureau between 2016 and 2020.

With funding support from the British Embassy in Kathmandu, the BBC Media Action team implemented a project called Promoting Gender Equality and Women’s and Girls’ Rights, which ran from last October to this March. It aimed to put in place a robust strategic communication framework to inform the longer-term policy influencing the government’s communication plan on gender equality and issues surrounding female rights.

Anju Bhatt and Manju Gautam, research

manager and research officer for Nepal respectively, conducted formative research to understand the current issues facing women in society, including identifying any policy gaps that might hinder equality between men and women.

“Like other female rights issues – such as gender-based violence, intimate partner violence, trafficking, education, and sexual and reproductive health rights – online violence against women stood out as one of the main issues faced by women and girls in Nepal today,” comments Bhatt.

In a blog for BBC Media Action, the researchers explained how they examined online violence against women in detail, and found that such cases are increasing and go underreported most of the time. They concluded that the causes behind the increasing number of online violence incidents have not been explored properly.

Even though the government of Nepal has implemented several initiatives to deal with online violence, the study identified gaps in the existing laws and policies. It found that the approach taken when it comes to dealing with online violence is far from comprehensive. For example, the police might take physical violence

seriously, but online violence less so, even though it can often be equally as harmful.

Bhatt recalls conversations with adolescent girls and boys during field research: “We found that students from both private and public schools mentioned having experienced online sexual violence, or knowing someone who had experienced such violence on a variety of social media platforms.” They determined that it is essential to give such topics due prominence to bring about a systematic change in the public mentality, something that requires institutions – such as education, the media, the judiciary and political systems – to be gender sensitive.

A qualitative approach was used for this research, and the researchers spoke to around 100 participants. Focus group discussions were conducted with adolescent girls and boys, as well as with adult men and women, while the key participants included elected representatives, government officials, representatives from civil society organisations, and women’s rights’ activists. Various research articles – published and unpublished – previous research carried out by BBC Media Action, newspaper and magazine articles, plus government acts, policies and plans were all reviewed.

Data collection, management and analysis was led by the BBC Media Action research team. Participants were briefed on the purpose of the research and the interviews. Verbal and written informed consent was sought from them for the discussions and interviews, as well as permission for the conversations to be recorded.

The study findings clearly show how Nepali women and girls continue to face different forms of online violence and discrimination. It is hoped this research will provide a platform for policy-makers to take these issues forward to policy level.

“First, we need public awareness,” notes Bhatt. “People need to understand that it’s real violence that has a real impact, and that sometimes it moves from online to offline.”

● **The original BBC Media Action blog can be viewed at shorturl.at/rC117**

RESEARCH TECHNIQUES

Going for gold

The pandemic changed many of society's accepted norms, including the way that market research is conducted. So what exactly is the new gold standard when it comes to professional insights interviewing? Colette Doyle investigates

From generating national statistics to providing informative data in person, research plays an incredibly powerful role in gold standard social surveys. This type of research was heavily disrupted by Covid-19 and a return to conducting interviews in person has proved to be complex and challenging.

Kantar Public successfully completed a live pilot of a return to Covid-secure, in-home interviewing in August last year. Since then, it has delivered almost 10,000 interviews with members of the public in the UK so far this year.

Ben Collins is the company's head of business excellence and, along with colleague Michelle Lewis, head of data and operations, has co-authored a presentation on the importance of in-home surveying.

Collins is candid about the challenges ahead: "The issues surrounding conducting in-person, especially in-home, research will continue. For some interviewers, uncertainty about what interviewing will now be like, and their personal safety, made them initially reluctant to come back. We know this is a challenge across the industry. But our interviewers, staff and clients demonstrated resilience from the onset of the pandemic and continue to do so."

Collins highlights how committed Kantar is when it comes to in-person surveying: "There are circumstances where research conducted by an interviewer, with that face-to-face interaction, is vital. In-person and in-home research, either alone or as part

of a seamless mixed-method design, continues to play an incredibly powerful role in helping us understand people and shape public policy."

Rachel Abbott, director and joint head of social change at The Behavioural Architects, believes that a mixture of in-person and remote research techniques best serves the projects on which her agency works. "It certainly feels easier to read the emotional energy behind what people are saying face to face, as well as to explore their context if we're meeting in their everyday environment. But, equally, remote interviewing can enable us to engage more participants in their own worlds and enhance accessibility – which is so important in our industry to increase diversity and inclusion."

Jaala Gallagher, client director at Barfly, a specialist consultancy that works with the global drinks industry, recalls that "there were certainly benefits to using Zoom for research during the pandemic, as it allowed us to continue working, despite all the restrictions, and to do so in a cost-effective way".

However, she points out that some essential cues may not be visible online. "It highlighted to us the richness you get from face-to-face interviews and the subtle nuances that can be missed on a virtual call. In-person interactions are much more likely to reveal those often-elusive insights, because, sometimes, it's not just what we say that reveals how we feel – it's how we say it."

Meanwhile, Tom Woodnutt, founder of

Feeling Mutual, believes it depends on the context. "Ultimately, face-to-face focus groups have many advantages over groups by webcam. It's easier to build rapport, explain stimulus, manage group dynamics and develop an intuitive understanding of people."

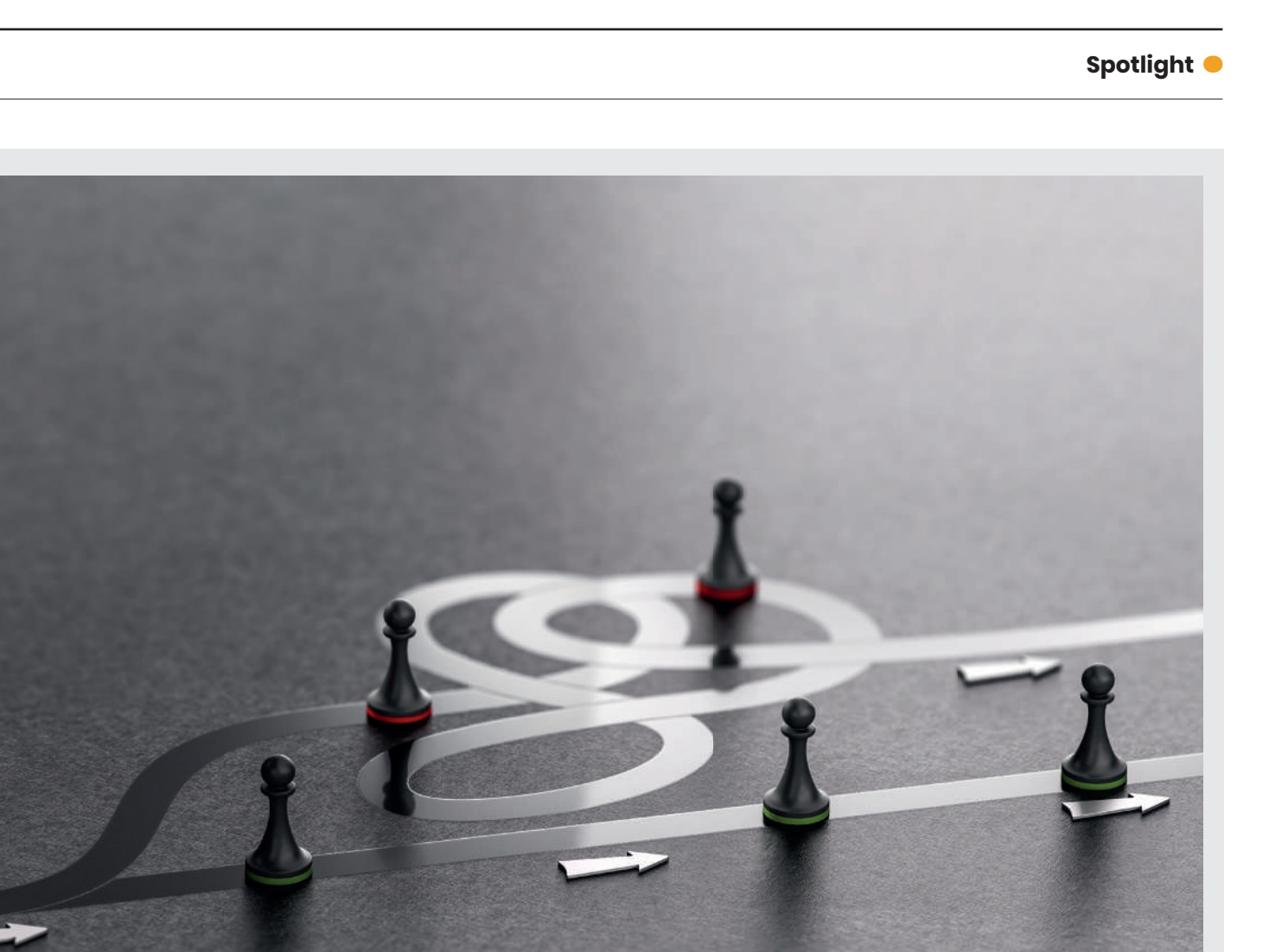
However, he cautions that there is a lot more to online qualitative research than webcam focus groups. "For example, there's asynchronous online and mobile methods, which mean you get feedback from people across a few days, rather than in real time.

"I believe that, on balance, asynchronous online qual gives you more than face-to-face groups. That's why we specialise in online and mobile qual, as we believe it is the gold standard for most qual research briefs."

He outlines the benefits of asynchronous online and mobile methods as he sees them: "They encourage more emotional disclosure and stronger validity, plus they're much richer in colour and you get way more depth than the equivalent in face-to-face focus groups. Participants' answers can be given in private, so they are not influenced by what others say. Also, they answer from the comfort of their everyday environment, rather than artificial viewing facilities. This inspires more candid emotional disclosures and reduces the risk of participants posturing in front of others."

Fed up with focus groups?

Focus groups have got a bad rap in recent years; Market Research Society (MRS) president Saj Arshad discussed their relevance in an interview with outgoing president Jan Gooding at the MRS conference in March. "It's all too easy to default to methodologies that have been used over a long time. We owe it to ourselves to take advantage of the full panoply of newer tools and methodologies now available", he comments. "There is a role for them



“There is a role for focus groups, but I would definitely like to see them run alongside more quantitative, purer methods of research”

[focus groups], but I would definitely like to see them run alongside more quantitative, purer methods of research, such as ethnographies and data mining.”

Brooke Ramsdale, managing director and country service line leader, qualitative and communities, at Ipsos in the UK, agrees with Arshad that focus groups are only one part of the toolkit. “We would never recommend making big decisions based on focus groups alone”, she says.

“At Ipsos, we have every qual method at our disposal: long-term communities, qualitative social intelligence analytics,

workshops, ideation sessions, curation, ethnography, in-the-moment qualitative mobile reaction, augmented reality, virtual reality, and, indeed, groups and depths – and let’s not forget the role of quant, too. While we moved away from groups when Covid hit, we still have briefs that really cry out for a face-to-face method. We had clients who paused key studies [during the pandemic] because focus groups are the best way to get at the nub of their problem.”

A combined approach will most likely be the way forward when it comes to formulating the new normal of insights

research, but in-person interviews will always have their place.

As Abbott at The Behavioural Architects observes: “It’s powerful, being there with people in person. After all, it’s not just what respondents say, but what they leave out, and that’s easier to gauge in real life.

“Being in the participant’s world as a researcher gives you a fuller picture of what’s going on, including the chance to observe and pick up on things that they might not think to share, but which could be of vital importance.”

Sound of success

Long known for its first-class customer service and exemplary employee retention rates, Richer Sounds is braving the perfect storm of Brexit, Covid-19 and the Ukraine conflict to emerge as a stand-out hero of the high street. Jane Simms catches up with chief executive Julie Abraham

Thirteen years – and counting – feels like a long apprenticeship. But Julie Abraham, anointed by Richer Sounds founder Julian Richer in 2009 as his eventual successor, has relished every day of it.

Eight years of close mentoring until Richer formally appointed her as chief executive in 2017 allowed her “to learn from everything Julian’s learned over the years”, she says, adding: “I feel very privileged to have had that opportunity.” As the company battles the fallout from the pandemic and Brexit, combined with the rising cost of living, the learning curve goes on.

Many entrepreneurs struggle to relinquish control of the companies they have founded, usually to the detriment of those businesses, but Richer has long been preoccupied with succession. The most tangible and high-profile manifestation of this was his decision, in May 2019, to transfer 60% of the shares in Richer Sounds, the hi-fi and TV retail chain he founded in 1978, to his employees. He had just turned 60 – the age at which his father died suddenly – and he felt the time was right to pass the baton.

Abraham didn’t see her promotion coming. “When Julian started to talk about a successor, never in a million years did I think it would be me,” she says. “He obviously spotted something in me that even I didn’t know was there.”

There were several things, says Richer. “Julie had no background in electronics when she joined us, but she did a few different things round the business and adapted very well. She’s loyal, hardworking and well liked, but, most important for a leader, she has great judgement.”

Unusually for Richer Sounds, Abraham joined head office from the outside. In common with the other directors though, she’s been at the company a long time – indeed, her 28-year tenure makes her something of a newbie. She had been working for IBM in Bahrain and, while back in the UK on holiday, had coffee with a friend who was marketing director at Richer Sounds.

“The next thing I knew, I’d agreed to have an interview for a job,” she recalls. Shortly afterwards, on the day the company opened its 14th store, she joined as a purchasing analyst. “It was a big departure”, Abraham admits, “but Richer Sounds was small and dynamic, so I had the chance to progress.”

The company has always recruited on attitude and personality, confident it can train people in the right skills. Abraham headed up stock control and purchasing, as well as IT, as she worked her way through – and up – the business.

“Then, one bank holiday at Christmas, Julian rang me out of the blue and asked me if I’d like to take over from him one day,” she says. “I thought it was a bit like one of those little ‘Break in case of emergency’ boxes you see. He gave me a week or so to think about it and I realised there was more to it than that.”

It has been, she adds, “fantastic” to work so closely with the man whose legendary leadership skills and business philosophy are encapsulated in the cult classic *The Richer Way*, now in its sixth edition, and embraced by a raft of retailers eager to see what a sprinkling of Richer dust might do for their organisations.

Instead of the resentment that can often creep in when a founder stays too close to a new management team, Abraham counts herself and her colleagues “very lucky” that Richer, who calls



‘When Julian started to talk about a successor, never in a million years did I think it would be me’



himself ‘managing director’, has remained involved. “The more we can learn from him, the stronger we will be if and when he ever decides to step back and retire,” she says.

When Richer transferred his shares into the Employee Ownership Trust, he did step back, leaving the management board to run the business and spending more time on his own projects and philanthropic activities. But when the pandemic hit, the neat division of responsibilities came to an untimely end.

“Julian says he grabbed the reins from me, and I say I threw them at him,” laughs Abraham. The first few months of the pandemic were “horrendous,” she acknowledges. “There was a constant worry that the warehouse would have to close because of an outbreak of Covid, which would mean the business wouldn’t be able to operate. We didn’t really know if we’d survive.”

Richer Sounds has long prided itself on holding its own against big online retailers such as Amazon because of its knowledgeable staff, exemplary customer service and competitive prices, but it

●
“The company has always recruited on attitude and personality, confident it can train people in the right skills”
 ●

also had web and telesales operations. Once it realised customers still wanted to buy from it, pandemic notwithstanding, it started to bring store colleagues back off furlough and

migrated them onto these platforms. “We called them our laptop army,” says Abraham. “They delivered the same advice as before, but virtually, and goods were delivered direct to customers’ homes from the warehouse.”

Tough though it was, she maintains that the company has emerged stronger than it was before. It set up its own warehouse last year to avoid being dependent on a third-party logistics provider and now offers video calls to customers to help them install their new kit and make sure it works in situ. Indeed, results for the 2020/21 financial year were so healthy that the business was able to return to the Treasury almost £500,000 of the support it had received to weather the crisis.

Things aren’t getting any easier, however. “We’ve been hit by stock shortages because factories in China have been opening and



The route to continued success remains a relentless focus on colleagues

closing due to ongoing lockdowns, there was a fire in the factory that supplies most of the world's computer chips, the container ship that got stuck in the Suez Canal dammed up worldwide shipping, Brexit has caused issues at the ports... You name it, we've been hit with it in the past couple of years," says Abraham. "And now we've got the dreadful situation in Ukraine, plus inflation, National Insurance and energy costs are all rising. It really is a perfect storm."

Consumer behaviour has definitely changed, she adds. "I haven't quite been able to work out what the pattern is yet, but there are definite signs that people are more cautious in their spending."

The business is managing the uncertainty by "just being very agile, thinking on our feet", Abraham says. "The purchasing department are spinning plates to try to ensure we have the stock that customers want, and we are also doing regular promotions. We've just got to stay on our game and make sure we can always offer the most competitive price on a day-by-day basis."

The split between in-store and online sales has almost returned to its pre-pandemic ratio of 80/20 in favour of stores (it is now 70/30), suggesting that the high street is not as dead as some suggest. "I'd love to see us steady at 75/25, and grow the overall cake," says Abraham. "That's a work in progress."

The route to continued success remains a relentless focus on colleagues. "As Julian says, if you look after your people they'll look

●
"Our stores are set up almost as independent businesses, so the manager and deputy are paid on the success and profits of their store"
●

tend to follow."

The company uses a raft of techniques to motivate staff, from letting them use the company's 12 holiday homes, to daily training (in work time) and a staff suggestion scheme. Shrinkage is around 0.1% of sales, a fraction of the 1% to 2% typical of the high street, and labour turnover is less than 10%, meaning the company saves millions on recruitment and sustains consistently high customer service.

The fact that staff are now shareholders, receive a windfall payment of £1,000 for every year they have worked in the business, and benefit from an annual profit-share payment, has boosted engagement further still.

Abraham explains: "All our stores are set up almost as independent businesses, so the manager and deputy manager are paid on the success and profits of their own store. But with profit share on top, they are interested in everyone else's performance too."

Abraham nails her colours to the mast in her LinkedIn profile, which is less about her than it is about the values Richer Sounds espouses. A signatory to the Good Business Charter (which Richer was instrumental in setting up), accredited by the Living Wage

after you," remarks Abraham, explaining that engaged, motivated and well-trained staff, combined with good-value products, make for happy customers. "If you put people before profit, the profits

Foundation, and holder of the Fair Tax Mark, she asks that organisations seeking to do business with Richer Sounds are similarly accredited to demonstrate their adherence to good business principles. “To be honest, I only put that on LinkedIn to stop all the flipping emails I got from people trying to sell me stuff, which drove me nuts,” she admits. “But this is the way we do business, and we want others who do business with us to do the same. It is in our supplier code of conduct.”

It’s almost impossible to quantify the effect of being an ethical business, Abraham says, because it’s always been in their DNA. “It’s part of our culture, and we are absolutely not doing it for marketing purposes. However, we use the accreditations as an opportunity to reinforce that this is the way we do business – and are proud of it – on social media.”

The response is “phenomenal”, she adds – far more so than for product announcements or other business news. “When we announced the Employee Ownership Trust, it went mad. Stories like that seem to gain an awful lot of very positive traction with customers.”

Independent accreditation is a way for consumers to see that you are walking the talk, not just talking a good game, she points out – but how does the company know that everyone in the business buys in? Abraham explains that, because colleagues have been imbued in the firm’s values from the day they join, it is second nature to behave correctly. She adds that the regular contact all staff have with senior people, combined with weekly morale surveys, results in the top team being able to quickly spot the signs of anything going awry, and address them.

With only 500 colleagues, the directors pretty much know everyone anyway, she says – and the value of having a long-standing, tight-knit management board also means the directors know each other and the business very well.

“There’s always someone who can say, ‘well, we did this before, let’s try it again,’” she notes. “I often find with people coming in, even consultants, that I have to spend a long time trying to explain

the culture to them. Which is why we always look to the stores first to find someone who might fit a particular role.

“Store colleagues also understand the products and the customers better than anyone, of course.”

It’s no accident that Richer Sounds won the *Which?* Retailer of the Year award again in 2021, with a clean sweep of five-star ratings across 10 categories, including product range and availability, product quality, staff helpfulness and knowledge, and value for money. Its customer score was 92%, five percentage points higher than that of John Lewis.

Richer has described the staff suggestion scheme as ‘the oil well’ of the business. The bell outside every shop was the suggestion of a manager nearly 30 years ago, who was concerned that when his branch was busy, he might not see a customer in a wheelchair wanting to come in (the shop doors are always closed to protect staff from pollution).

Likewise, the comprehensive ‘jargon buster’ section on the website was a staff suggestion. Abraham says: “Most of what I do every day has stemmed from a staff suggestion at some point. As well as being the cornerstone of innovation at the business, it is a great way to make staff feel involved. Everyone knows they can contribute.”

Since the transfer of ownership, employees are even more involved in which suggestions should be implemented, referring them to heads of department only at the end of the process. Similarly, colleagues are more involved in the company’s philanthropic activities, encapsulated in the new Richer Sounds Foundation. “I’m not allowed to be involved – though I can add my two pennorth if I’m asked,” says Abraham.

Perhaps one of the reasons Richer and Abraham work so well together is that they are completely different. “I’m a lunatic maverick entrepreneur, and Julie is far more sensible,” says Richer. “I have crazy ideas and she will give me the reasons why they won’t – or sometimes will – work. It comes down to judgement again.”

Abraham agrees. “We complement each other,” she says. “Julian is brilliant at thinking of the worst-case scenarios, whereas I tend to be a bit more relaxed – though a colleague did recently describe me as ‘a velvet steamroller’. Sometimes we agree to differ, sometimes we compromise, but he always listens to me. I wouldn’t have lasted this long as his successor if we’d not been able to talk about things.”

One thing they are absolutely in tune over is the importance of succession. “I think a weakness in the past has been that, while we have had a great set of directors, the people below them have not been ready,” Abraham says.

Suddenly losing a very senior colleague from one particular department during Covid was a bit of a wake-up call. So she recently instituted a series of ‘Julie’s succession sessions’, which will focus on developing leadership skills in people below board level.

As the number of stores is likely to remain fairly constant (Richer made a strategic decision early on to open stores only in freehold premises in areas of high-density population), Abraham will concentrate on ensuring the business remains agile and adaptable.

“I’d hate to think that all the work Julian has done to get us this far would be ruined because we don’t have a plan in place for the future generation,” she concludes.





Untethered times

The cost-of-living crisis has come roaring to the fore. Brands need to be savvy and rethink their marketing strategies to successfully navigate the challenging times ahead, as Rob Gray reports

According to data from the Office for National Statistics, in the 12 months to April 2022 UK inflation hit a 40-year high of 9%. This alarming surge in prices has caused a drop in ‘real’ disposable incomes, and everywhere there are headlines about people looking for ways to save money, or struggling to make ends meet – and, worse, heartbreaking stories of poverty, desperation and foodbanks.

Sanctions and supply shortages triggered by the war in Ukraine have exerted strong upward pressure on prices, most notably in respect of everyday essentials such as food and energy. This comes on the back of inflation driven by the Covid pandemic. Affordability has become a hot issue globally, in a way that hasn’t been the case for decades and it is loaded with numerous social, political and economic implications.

Brands are understandably taking steps to get to grips with the changes consumers are making and what these mean for their business. Market research (MR) is, of course, central to this, and many MR companies are conducting research into how consumers are responding to cost-of-living challenges (COLC). Establishing what changes are being made by consumers who are feeling the pinch is a hugely valuable insight for brand owners that will probably shape marketing activities such as pricing, promotion, pack sizes and other actions.

“Consumers are having to change their shopping behaviours quite quickly,” says Lucia Juliano, head of research for the UK & the Netherlands at Harris Interactive, part of the Toluna group. “So, market research companies have to adapt quickly too. There is a real need to listen to consumers and make business decisions rapidly. You can’t have decisions that take 12 months to implement – it has to be now.”

Toluna uses two major intelligence platforms to

unearth COLC insights. First, there is the Global Barometer, an online survey covering 16 countries (with a nationally representative sample of 1,000 people in the majority of these markets). When it began in March 2020, the main focus was on the impact of the pandemic, but it has been tweaked to accommodate COLC questions as the crisis has moved to centre stage. The survey is conducted either monthly or every two months and, at the time of writing, 19 waves had been completed.

The other product is the UK-focused Instant Impact survey, using the Toluna Start consumer insights panel to provide a finger on the pulse. It is run rapidly; in a recent wave, 1,000 interviews were conducted in just five hours.

“It is designed to be very topical – very much a pulse of the moment,” observes Juliano. “We know it’s important to show brands what consumers are doing: where people are cutting back; what they want brands to do; how they are going to shop differently; where they might be holding back their spend – because that impacts so many brands. When it was first designed, we didn’t know it would be as popular as it is. Clients have loved it, responded really well, and asked for more.”

We’ll come back to some illuminating findings from Instant Impact and the Global Barometer a little later on. But first, let’s examine some of the reasons brands need to be on top of the COLC.

Getting to grips with the crisis

Brands don’t exist in isolation from the outside world. As Nikki Cunningham, managing director of creative branding agency Curious, observes, they are forever shaped by their surroundings, which calls for an understanding of the political climate and cultural shifts, and reaction to this based on their core brand. The fundamental nature of a brand is to represent a shorthand for how consumers should feel when using their product or service.

●

“Consumers are having to change their shopping behaviours quickly, so market research companies have to adapt quickly too”

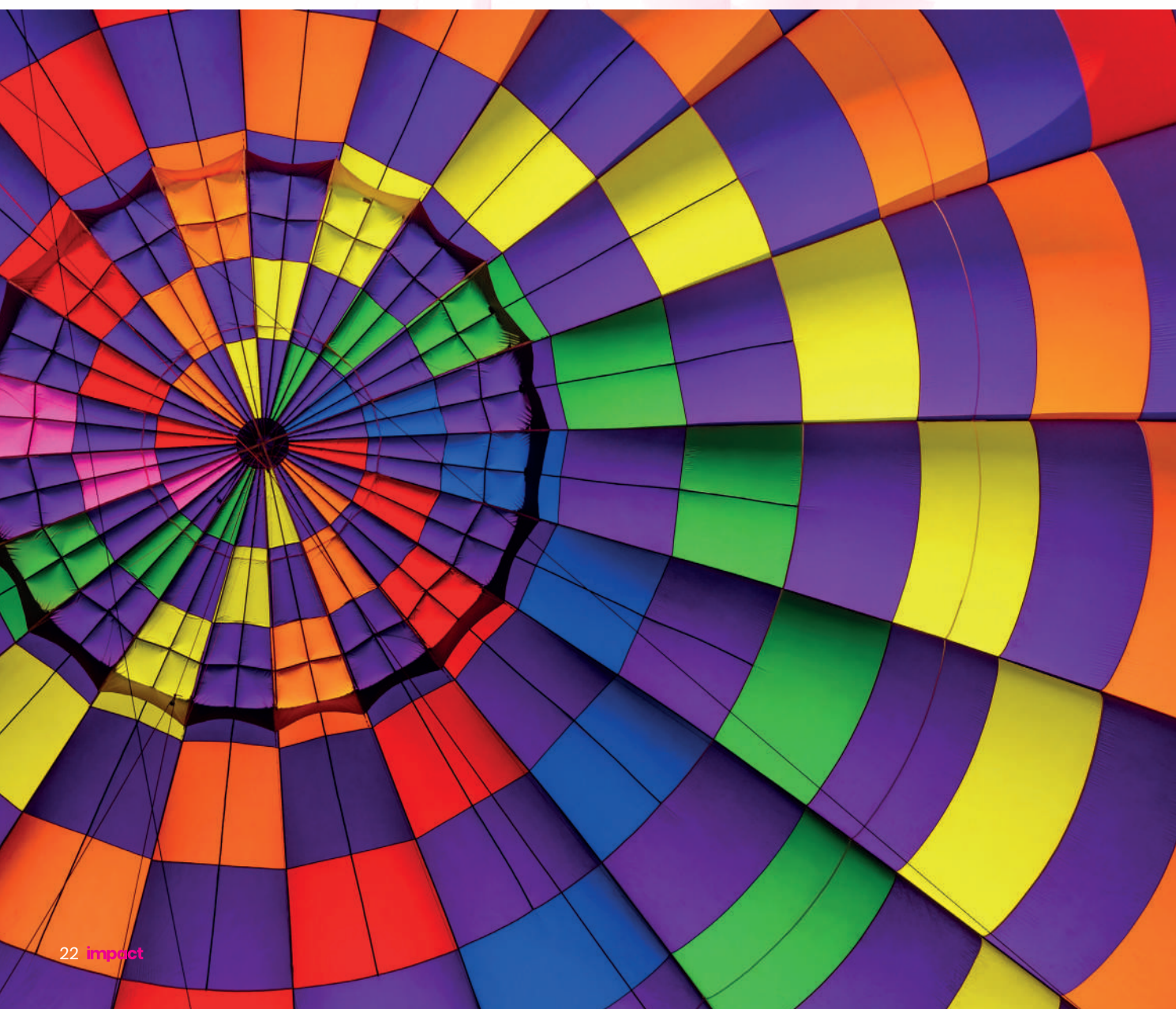
●

“The cost-of-living crisis is one that can’t be avoided by brands, because it directly impacts how consumers spend their money,” says Cunningham. “Brands need to find a way to demonstrate how they relate to their customers’ needs and pay attention to what their priorities are. They need to show how they can support their customers and have a positive impact on their life that outweighs the need to cut down on spending. If they can do this, they will be able to remain a plus, rather than a minus.”

More people are now more worried about their finances (38%) than they are about catching Covid-19 (33%), according to researchers at University College London (UCL), who conducted the Covid-19 Social Study, something that is indicative of the seriousness

of the situation. These findings are based on a survey of 28,495 people, funded by charitable trust the Nuffield Foundation, public body UK Research and Innovation (UKRI), and the charity Wellcome, and show that the return to more ‘normal’ post-lockdown living has not had all the mental health benefits that people necessarily expected. Growing concerns about finances, says lead author Dr Daisy Fancourt, of the UCL Institute of Epidemiology & Health Care, suggest that new psychological stressors are becoming dominant for individuals.

“We know that when you struggle to make ends meet it will affect your mental health,” says Max Templer, research director at BritainThinks. “Yet, we also know that the effects of the COLC vary



considerably. What we need is nuanced understanding of how factors such as mental health, interaction with local communities, financial impact, socialising and increased working hours interact with one another. We also need to consider how we define 'essentials'. Twenty years ago, a mobile phone or internet access wouldn't have been thought of as essential. For some people, the ability to have a creative outlet might be considered an essential factor in maintaining their mental health. What does 'essential' mean for people in 2022?"

This is indeed an interesting question. Toluna's UK-focused Instant Impact survey findings from April show that a mobile phone contract tops the list of things people are least willing to forgo, followed by TV subscriptions and drinking alcohol at home. It seems many consumers do indeed consider their phones to be essential items. By contrast, 46% of people are prepared to cut back on eating out, a 6% rise on the previous month; 43% (+4%) are ready to reduce spend on takeaways; and 38% (also +4%) to cut down on drinking alcohol in pubs and bars. More nights in front of the TV are clearly on the cards.

These behaviours are being driven by real financial worries. The same Toluna research found 57% of UK consumers to be 'very' or 'extremely concerned' about their personal financial security, a 6% rise on the previous month. The cost of grocery shopping is where they felt most impacted, (55%) driven mostly by noticeable price rises in fresh and chilled produce.

In an effort to keep spending under control, there is evidence that some consumers are changing their shopping behaviour. For example, buying more own-label, changing brands, or visiting more stores in search of better value. Clearly, behaviour change of this kind has significant implications for grocery brands and retailers.

"All of this will come down to different people's personal situations," says Harris Interactive's Juliano. "How are they trading off everyday luxuries versus big-ticket luxuries? How are they apportioning the money that's left? How are they able to make ends meet from that perspective?"

Some people, she adds, will be determined not to give up a holiday abroad because Covid has prevented them from travelling for two years and they are prioritising that experience. Others feeling the pinch may consider that international travel is something worth sacrificing to balance the domestic books.

Brands have a big choice to make in terms of how this plays into marketing strategy. Do they talk about

price because it is so top of mind, or do they continue to plug their sustainability and social credentials, given that this still matters to consumers?

Toluna's Global Barometer research found that 67% of consumers want brands to be "sincere and authentic" in what they do, and 59% want to see real commitment to reducing packaging, especially plastics.

Tracking consumer sentiment

Toluna is providing a bespoke option for clients who want brand- or category-specific insights into how COLC is affecting their consumers. "Some clients have asked us to set up trackers to help them with their consumer empathy," explains Juliano. "We are helping them understand and listen to consumers in whichever markets are specific to them, around whatever categories are specific to them, and we are tracking that over time. We set that up quickly, but we have put a lot of thought into the design.

Obviously, we don't yet know where things are going to go next month or further out, so we've tried hard to develop trackers fit for the future evolution of this crisis."

Let's take the fictitious example of bespoke research for a yoghurt manufacturer. Juliano explains that this would begin by exploring how people might begin to change, starting at a macro level with what is impacting their lives and what their priorities are. Is their financial situation being affected,

and to what extent? The research would then drill down to the product/category level to establish whether consumers intend buying more or less of the brand, whether they have noticed price increases or availability issues, and whether they have tried different brands on promotion or substituted in favour of own-label products.

Perhaps it is a case of buying bigger pots to get better value – or maybe buying an alternative to yoghurt? Is yoghurt something they might happily live without – a nice to have, but not necessary – or is it a treat or essential that will still be bought, even if that means sacrificing something else?

This sort of granular information could make a big difference to sales performance, and brands will certainly need to stay on top of consumer behaviour as the crisis evolves. While studies such as Ipsos's 24-country Global Consumer Confidence National Index show that topline consumer confidence has recovered since the worst days of the pandemic, there is also a clear expectation of a fall in living standards. The poll finds that economic optimism has been declining in Europe and the US since mid-2021: in six

●
“Brands need to find a way to demonstrate how they relate to their customers’ needs and pay attention to what their priorities are”
 ●

out of 10 countries less than half feel they are on a financially sound footing.

“What is interesting about the current food and energy price crunch is that all sorts of organisations – from charities to brands to central bank governors – are interested in how people are reacting and behaving,” says Ipsos CEO Ben Page. “A key finding is that, in most countries, consumers are still underestimating how bad it might get. Of course, we can see people switching to private brands, moving to the discounters and cutting their discretionary spend on eating out, big-ticket items such as cars, and on major household goods – but, so far, not asking for wage rises. These remain well below inflation; we will be tracking how this changes.

“The cost-of-living crisis is only just beginning and its consequences are unpredictable. For countries that import fuel and food, it may be existential. Much of North Africa and some Asian countries face much more severe problems than the UK, a still relatively rich country. The long-term political consequences, as with the [financial] crash of 2008, are not immediately visible, but they will be in years to come.”

Page rightly points out that charities are taking a keen interest in the COLC, which is understandable given the potential revenue squeeze and rise in costs that many are facing. Research among 547 charity leaders, conducted by YouGov in April on behalf of the Charities Aid Foundation (CAF), found that one-third fear for their survival, and 86% are worried about the impact that rising living costs are having on people who rely on their services.

Responding to the findings, Alison Taylor, chief executive of CAF Bank and Charity Services, warns that the sector faces a “perfect storm”, with tightening household budgets impacting donations and rising operating costs – and, sadly, this means some charities are unlikely to survive this year. Many are on tenterhooks, waiting to see how far the squeeze on consumer finances erodes charitable giving and trying to figure out how they can mobilise those least affected by the crisis to do more.

In the private sector, brands are responding to some clear consumer behaviour shifts in several ways. Smart frugality is a mindset being championed by brands from IKEA to Barclays, where taking a more prudent approach is encouraged as the way all sensible shoppers should head. This has the double benefit of being positioned as financially astute and sustainable, as it better protects the Earth’s resources.

Continuing with this theme, several brands are embracing the second-hand marketplace. While eBay

and Depop have built businesses around this, brands and retailers are now getting in on the act – as seen with Cos Resell and Selfridges’ Resellfridges. Michela Graci, strategy partner at design agency Coley Porter Bell – where she works across clients such as Tesco, Müller, Fox’s and Premier Foods – says this is sustainable behaviour; it builds brand loyalty, potentially brings in new shoppers, and there is the halo effect of being seen to do the right thing.

Staying relevant and connected

But what of luxury brands? How should they behave given their well-heeled target market is far less likely to have to cut back on spending?

“The COLC is an interesting issue for the luxury end of the market,” notes Graci. “While luxury brands tend to be well insulated from the impact of the mass population having to tighten their belts, they do have to be cautious about coming across as insensitive and tone deaf. In this social media age, that is quickly jumped on and lambasted, which can damage brand value.

“For some luxury brands, this is an opportunity to come across as more relevant and better connected to local markets or communities. It requires an inclusive, rather than exclusive, approach and can help luxury brands appear more culturally relevant – especially to Gen Z.”

Laurent Manès-Murphy, general manager for new markets at customer agency C Space, says consumers have different “mental wallets” when it comes to spending. By which he means people still need moments of indulgence and seek status, while being prepared to compromise on more functional items. Manès-Murphy makes the point that it’s easy to be simplistic and assume that people are cutting costs across the board and looking for cheaper versions of everything – yet, decisions are often more nuanced and emotionally driven than that.

“Sustainable options are definitely feeling the pinch among those customers who are in transition between less and more sustainable living, down to those who still see it as a premium-driven enterprise that is out of reach completely,” Manès-Murphy remarks.

Whether it be EON sending socks to customers, SSE advising them to keep bills low by cuddling pets, or the CEO of Utilita suggesting people wear jumpers instead of turning on the heating, some brands have made gaffes when addressing the spiralling costs of their services. There is clearly a need to build customer empathy among marketers and leadership to help them better understand what their consumers are going through. “The disconnect that exists

●
“The disconnect between the hipster marketers and CEO-billionaires bubble and the rest of the country has rarely been more apparent”
 ●





between the hipster-marketers and CEO-billionaires bubble and the rest of the country has rarely been more apparent,” observes Manès-Murphy.

This has led C Space to put greater emphasis on customer closeness in its COLC research project. For instance, arranging for the finance director of one of the big telecommunications companies, who is a Kensington resident, to go to Peckham with a student, armed with just a £20 note to do a week’s shop.

More generally, a change of mood has become evident. Manès-Murphy says he has seen a big discrepancy between some of the responses C Space was getting at the end of last year, and today. “When building an ideal lifestyle subscription with customers in Q4, the proposition was packed full of lifestyle and entertainment benefits – think cinema tickets, coffee vouchers, spa days,” he says. “On a recent UK-wide quant study, done on the same week that the energy cap was lifted, we got almost completely opposite results.

“Customers couldn’t care less about lifestyle benefits – it was all about financial benefits. Unsurprisingly, the trend was most severe for young families. This reflects a tendency to seek reassurance from rational levers in times of crisis, even if it will probably not make you happier or wealthier.

“A recent Which? survey indicates that 59% of the population had to make adjustments. The key question is this: what kind of trade-off between mental wallets and financial ones are people making when thinking about these adjustments?”

Supporting those who are struggling

What, though, can be done for those who are really struggling? Where will they look for help? Toluna’s Global Consumer Barometer found that 46% globally would turn to family if they needed financial help/support over the next few months, ahead of banks/building societies or asking a friend – both of which came in at 21%. But might some people be reluctant, out of personal pride, to be open and honest if they are in financial difficulties? Juliano believes not, at least as far as quant research is concerned.

“Research is so anonymous, you can say anything,” she remarks, “and people are used to talking about things very openly. We have some data where we ask people how your financial situation is now compared with before the pandemic, and how you think your financial situation is going to change in the next three months. People are reasonably happy to answer questions like that. Also, it’s not everybody who thinks they are going to be affected by the cost-of-living crisis; it’s the majority, but not everybody.”

Juliano accepts that qual research may be a different matter in terms of openness. There’s certainly a need

to proceed sensitively, as BritainThinks is doing with an ongoing series called the Cost-of-Living Diaries. These look to uncover overall concerns about the crisis, how people are adjusting to rising prices, and how they expect to cope over the coming months. Given that concerns and behaviour change are uneven, an important part of these studies is understanding how certain typologies and demographics are reacting to the COLC.

Research on financial difficulty and poverty can be a challenge, admits Templer. “Poverty, for many, feels pejorative – plus, there are challenges around how people define themselves. Many won’t want to admit that they are struggling. For some segments, such as parents, it can feel like an accusation. It’s important to be able to create the space in the qualitative process where people can open up and feel comfortable enough to talk candidly about the issues they are facing.”

From its own research, BritainThinks has found that half of those who are struggling most are either disabled or have long-term health conditions. In a similar vein, research among 2,000 people with cancer in the UK, by charity Macmillan, found that 24% – almost 750,000 people – say they “can’t afford life at the moment”, and have been buying less food or making fewer hot meals to try to cope with soaring prices. Meanwhile, research by thinktank The Food Foundation, published in May, found that more than two million adults in the UK have gone without food for a whole day because they cannot afford to eat, with 7.3 million (one in seven adults) estimated to be food-insecure, representing more than a 50% rise from 4.7 million in January.

It hardly needs saying that vulnerable people face many challenges over the coming months. The big question is, what can be done to help and support them? Also, there is no escaping that the COLC further highlights disparities and inequalities in society. Those who feel left behind may become ever more aggrieved and, from a political and social standpoint, it is important to understand and attempt to rectify this.

Even before the pandemic, the West faced a collective crisis of “the loss of the future”, says Page.

“The vast majority of people in the UK, for example, believe each generation should naturally be wealthier than the one before it. The challenge is that – whereas nearly everyone said this was what they expected their kids would achieve – now it has fallen to less than half the population, and many are expecting their children to be poorer than them.

●
“Poverty, for many, feels pejorative... For some segments [of society], such as parents, it can feel like an accusation”
 ●

Understanding the Agile Research Landscape

We surveyed Insights and Marketing professionals from across the globe to understand the state of the agile research landscape—and where it’s headed going forward.

- ▶ 395 Insights and Marketing Professionals
- ▶ 25 Industries
- ▶ 14 Global Markets



Scan me!

To get the full report on how Marketing and Insights Professionals plan to simplify their research journey, scan the QR code below.



The pandemic and its uneven effects, and then the cost-of-living crisis, are just making this worse. More and more people will be forced into debt, and they will look for someone to blame.”

In this gloomy, and frankly frightening, context, high-quality insight into public attitudes will be essential. After a bounce in positivity following the worst of the pandemic, a lot of people are now very worried about what the future holds. Ipsos research found that nine in 10 (89%) Britons are concerned for the country as a whole, while 83% are worried about the impact on themselves personally. Eight in 10 (79%) are concerned about the effects it will have on people in their local area.

Overall, consumer confidence has taken a hammering. GfK’s consumer confidence barometer fell to -40 in May, from -38 in April, the lowest level since the survey began in 1974. That means consumer confidence is weaker than in the darkest days of the global banking crisis, the impact of Brexit on the economy, or the Covid-19 shutdown.

With many people now trepidatious or actually struggling, brands and organisations of every kind must ensure they are in tune with the mood so as not to alienate or offend. That calls for a clear understanding of how the COLC is developing



globally, nationally and even across different UK regions.

Successful navigation of the crisis requires insight and sensitivity in abundance. Many people are having to cut back, and some are having to tighten their belts much more severely than others. Brands should be aware of the psychological toll this is taking on our community, both locally and in a wider sense.

Delivering real-time tailored insights in a crisis

The rapid changes to consumer sentiment and behaviour prevalent since the beginning of the pandemic, and now exacerbated by the swiftly evolving cost-of-living crisis, have shortened research timeframes. Understandably, clients do not want to make decisions on the basis of insight that is outdated, or not entirely relevant to their particular requirements.

Toluna Start, the industry’s first end-to-end, real-time consumer intelligence platform, speeds up the time to insight dramatically. With a single log-in, insight professionals can perform quantitative and qualitative research, anytime, anywhere – either through self-service solutions or through custom research programmes built with the help of our research and service experts.

When it’s the former, projects can be launched within minutes. At a time when everyone is keeping a close eye on budgets, the ability to drive efficiencies by speeding up the time to insight is very important for agency and clients alike.

The seamless integration of our consumer panel means Toluna Start can deliver insights in real time, rather than having to wait for days or weeks. Moreover, the platform works for everything from quick-turn research to highly complex projects.

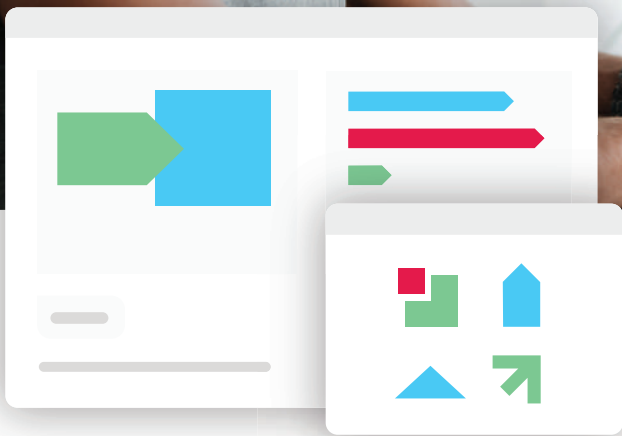
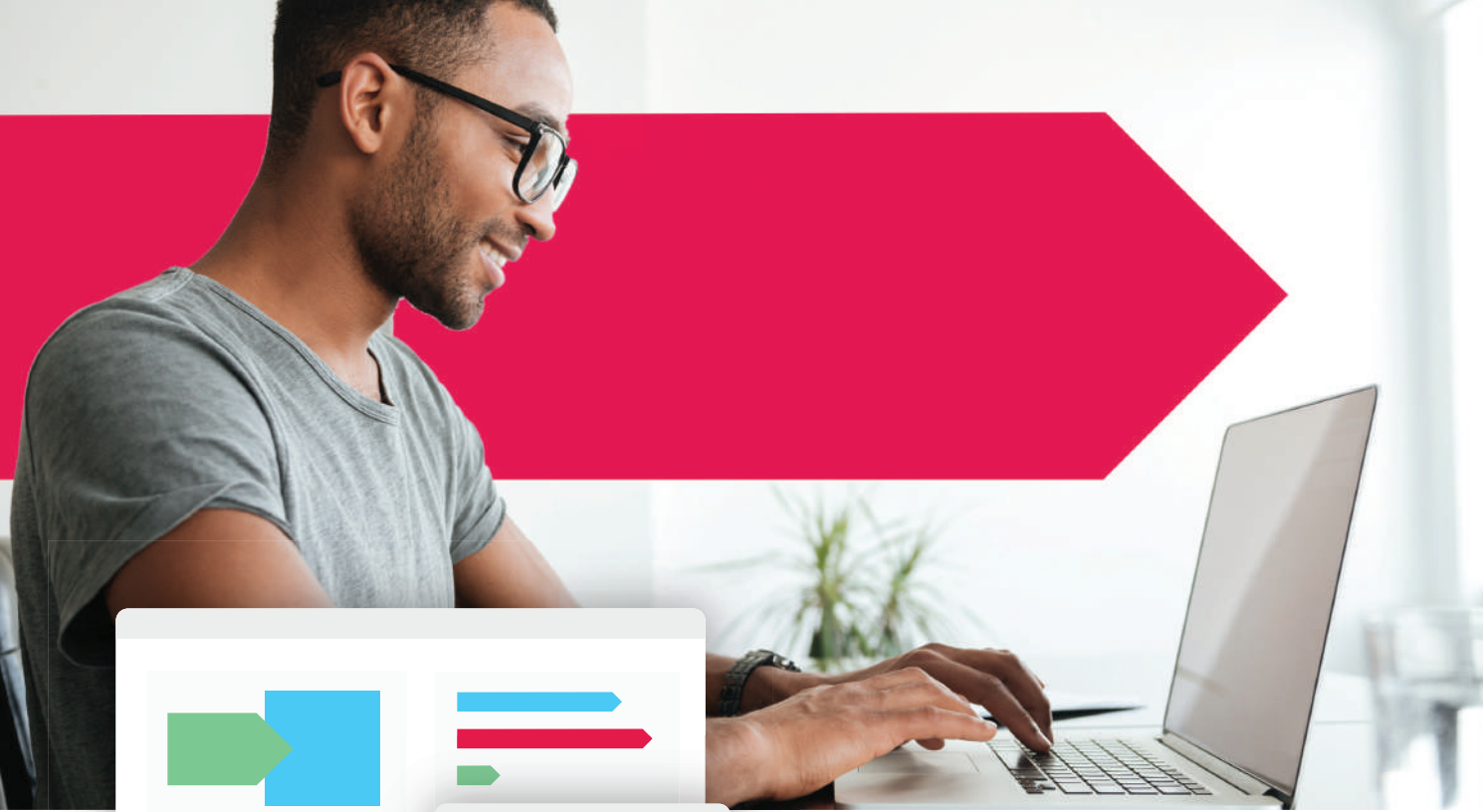
“Partnering with Toluna means we can deliver robust insight to our clients faster than we’ve ever been able to before,” says Cat Harwood, from market research agency Two Ears One Mouth. “Being able to script and launch ourselves means that we can work swiftly to turn around projects and we’ve been

delighted with how user-friendly the platform is.”

Our expert team is also available to provide support for more complex projects if required. It’s not a case of us saying, “here’s our technology, good luck”. If you need us or want to focus on other added-value tasks, we are there to share our knowledge and help unearth the answers you are looking for.

Given that Toluna Start provides on-demand access to 40+ million consumers across 70 markets, it can be used to generate a global view, or to drill down into what’s happening in specific markets. As the cost-of-living crisis bites, brands and agencies will need to keep their fingers on the pulse to stay competitive.

● **Jamie Clarke, director, market research, Toluna**



Think Forward.

It's easy to make today's decisions when you have tomorrow's insights.

Toluna is a technology company that delivers real-time insights at the speed of the on-demand economy. We do what no other insights company can. We combine innovative technology, award-winning research design, vertical expertise, and a panel of over 40+ million consumers.

Start knowing.



Website: tolunacorporate.com



In for a Penny

HSBC is one of the world's leading banks, but is keen to maintain its global reach in an increasingly insular world. Liam Kay looks at how insights are helping it change focus

What does it mean to be a 'citizen of the world'? At a time of political and economic unrest, and recovery from the Covid-19 pandemic – and following a period of rising nationalism – what does an 'internationalist' look like?

These questions are at the crux of a recent push by HSBC to reimagine itself and examine its internationalist credentials. The British bank, with its roots in Hong Kong and Shanghai, is one of the world's biggest financial services firms and has long positioned itself as 'the world's local bank', with worldwide operations generating a reported profit of \$14.7bn and revenues in excess of \$49bn in 2021.

However, given the changes afoot in the global economy and in many societies worldwide, HSBC has been using insight to stay ahead of its competitors and maintain its international credentials. The result has been a piece of work focused on identifying the characteristics of a modern internationalist (see boxout), and, ultimately, using the findings to shape HSBC's understanding of its brand and communications functions.

Globetrotting ambitions

The internationalists project was born out of a desire to look at how HSBC's brand could continue to evolve, and to develop something that could be "creative and catch an emotional nerve",

“This is about making sure we are resonating with global audiences”

according to Sebastian Mitchinson, insight manager at HSBC. "We have been the 'world's local bank'. We have moved on to a story of 'together we thrive', and, more recently, embraced 'opening up a world of opportunity'. This is about making sure we are always resonating with global audiences.

"But then there is the local factor as well. How do you straddle those two spheres [local and international], particularly in the world as it is now, when the pace of change is exponential? A lot of our competitors are strong in their local markets or have different competitors. They are all shaping the business audience's expectations, and we need to keep up with that."

The company uses a range of suppliers – from large multinationals, such as Kantar and Ipsos, to smaller self-service suppliers, including InMoment and Qualtrics – with 30 to 40

companies in its 'agency ecosystem', an informal roster for suppliers that acts as a form of directory.

For the internationalists project, however, the bank was on the lookout for fresh voices, as well as its tried-and-trusted partners, says Mitchinson. Differentology eventually won the pitch, and the decision was taken to focus on 'internationalists' as a theme for the brand.

"I really loved their website – the way they presented things hit home with me," Mitchinson explains. "I thought this could give us something different.

"We wanted to go after internationalists, which aligns with our brand ambition to be the world's leading international bank. If we can understand those people, their mindset and where they are coming from, how they approach the world and navigate change, and what appeals and resonates with them, we can shape our point of view around that and talk to them."

What exactly is an internationalist? Traditionally, HSBC had examined the idea through customers' needs – a consumer having children overseas, a business with international trade. The new project focused on internationalists at an attitudinal level and set out to understand aspects of their mindset, such as acceptance of other cultures and a general open-mindedness. This broad definition covers approximately half of the population.

"As a bank, we wanted to relook at

what international means in light of cultural changes and the way the world is changing around us, even before Covid-19,” says Josh Sorene, head of brand and reputation performance and insights at HSBC. “Part of this was expanding our view of international beyond just physical movement of people. As a newly formed insight team, we want to bring disruptive thinking into the bank. This means challenging the status quo around what international really means.”

The findings confirmed many of the aspects of being an internationalist, and allowed the bank to understand their characteristics and role in society. One example, says Mitchinson, is their love of stability in an ever changing world, as well as a more outward-looking approach to the world around them.

“The world is now based on change, and having a moment of stability is a fantastic luxury to be savoured. They can pivot with change, but also embrace the stable moments around them,” he says.

“There’s an appreciation that the individual focus for society is not the only way either. Sometimes it pays to be more collective, be it looking after your family or looking after the planet. Sometimes, we have to work together.”

The right path

The work has helped change HSBC’s approach to its brand, culminating in a restructure of the firm’s insights function. What was once a single insights department has been split into three, with one focused on consumer wealth, another on business to business and commercial, and a smaller, crossline business team – led by Sorene – that is sat within the bank’s brand and communications department. The restructure is part of a more radical overhaul of how HSBC treats the concept of brand.

“As a newly formed communication and brand function, this allows us to elevate the role of the brand,” says Sorene. “Brands should guide how organisations behave. As a brand insight team, we are focusing on



bridging the gap between expectation and reality.”

“We are deliberately decoupling brand from marketing,” he adds. “That is a strategic decision we are making to elevate and change what brand means, and trying to move brand away from being advertising and marcomms to being anything that changes and influences perceptions of HSBC.”

“This piece of work has done a great job in unifying a persona that can work across the bank. There is often a focus on ‘a commercial customer looks like this; a retail customer looks like this’, while, ultimately, they are just people – there is one brand; there is one human.”

The result is that, as of the end of 2021, marketing is no longer a function, but a discipline within the organisation.

●
“Marketing is no longer a function, but a discipline within the organisation”
●

There were two primary drivers behind this. One was that marketing would sit better within the lines of business. Marketing is now more of a short-term sales function within the business; brand has been decoupled from it and placed in the communications function, which has been renamed as ‘communications and brand’.

“The purpose of that is two-fold,” says Sorene. “One is that there was a feeling we were suppressing what we really meant by the brand by sitting it within marketing. When brand was in marketing, brand was logos, designs, font sizes and distinctive assets. While it is still those things, it is now far broader and, as a brand team, we are across anything that impacts on how people view the bank.”

He goes on to say: “A lot of brand measures that exist in organisations are vanity measures – things such as the number of likes and clicks and awareness. What does it translate into, and can we start to quantify better the commercial impact of some of the movements we see in the data, and demystify what brand means? For too many people, brand is some kind of wishy-washy advertising idea, and we are trying to change that. We also need to go beyond what consumers think of us to understand brand through the lens of employees and stakeholders.”

Over the horizon

The restructure means that the global head of communications and brand, for

the first time, sits on the HSBC board, providing direct access to the executive team and board for the insights divisions. This means that insights work, such as the internationalists project, has the opportunity to influence strategy and take on a far more wide-ranging role across multiple departments at once, avoiding a fragmentary or siloed approach.

An insight guild has been set up to ensure insights professionals working across the company are adequately supported with knowledge, training and relationships. There has also been a push to democratise access to insights across the company through Hall & Partners' Hub platform. The challenge in the longer term for HSBC is to get more enterprise-wide insights and to build a story around them.

HSBC has long focused on its international profile, as much a legacy of its formation during the 19th century in Hong Kong as its modern-day status as a global financial powerhouse. "One of the things that becomes very clear as a bank is that international is our superpower – it is our USP," Sorene states. "The challenge is how to make international relevant, not just to different parts of the bank, but also to various countries. How HSBC is seen in the UK is very different from how it is seen in Singapore, for example."

It comes at a time when world events – from Brexit and Donald Trump's election in the US to the strong showings for nationalist parties in the recent French presidential election – suggest a more insular, close-minded world. If globalisation is in retreat, how does being an internationalist remain relevant in that context?

"This is the bedrock or springboard that allows us to understand the many lenses of international and be the thought provoker that moves the mindset of the bank around international," says Sorene.

"It is not just the physical movement of people and goods – it is a mindset, behaviour and attitude. Once you look at international through that lens, it opens up a whole different universe."

A global view

For the internationalists project, Differentology carried out a study in eight global markets: Canada, China, Hong Kong, Mexico, Singapore, the United Arab Emirates, the UK and the US. The research came in four parts: the first was an artificial intelligence discourse and semiotic analysis, followed by online ethnographies, online filmed interviews and stakeholder workshops. Around 144 respondents took part in the qualitative section of the research, ranging in age from 20 to 70, and from entrepreneurs and senior executive team members to people closer to the beginning of their careers. There were 18 interviews carried out in each of the eight markets featured in the research.

The findings focused on three elements. The first was an 'anatomy of an internationalist', which set out the characteristics seen in internationalists identified in the study. This included factors such as being 'adaptable', 'ambitious', 'authentic', having 'agency' and being 'active' and mobile. These five characteristics remained constant across geographies, political persuasion or income level.

The second element focused on the 'navigation system' for internationalists. For most, stability was the new luxury, as world events and global markets become more turbulent. There was an appreciation for the advances being made in non-western nations, such as China, and happiness was viewed as the 'currency of the future'. Internationalists were, predictably, profoundly anti-isolationist and championed openness, connectivity and movement, as well as favouring sustainable capitalism, innovation and transparency.

The final part of the project examined three opportunities for HSBC as a brand: anti-isolationism, change as part of the firm's DNA, and fluidity in identity and how it alters over people's lifetimes.



Performance reviewed

Tripadvisor uses professional insights to better understand prevailing travel trends and find out what consumers really want when they visit a particular destination. Editor Colette Doyle speaks to research and insights lead Tatiana Gonzalez to find out more

One billion – that’s a heck of a big number by anybody’s standards, but that’s the number of reviews that Tripadvisor had clocked up from its users by February this year. The travel guidance site, which was founded 22 years ago, says it hit the milestone through a combination of reviews, tips, photographs, likes, comments and posts. “We were very excited to get there,”

notes Tatiana Gonzalez, research and insights lead at the Massachusetts-headquartered company.

Gonzalez heads up the professional insights team that sits within the TAPS organisation – Tripadvisor Advertising and Partner Solutions. Although the focus for her six-strong team has traditionally been media, she works cross-functionally with other departments, such as communications,

enterprise and hospitality, as well as operating “hand in hand” with analytics.

“We have, in fact, just hired for a role that will not be media-focused; its remit will instead be to work closely with other groups within the organisation, providing them with more ready access to insights and research,” she explains.

Having spent most of her career in New York, Gonzalez is currently enjoying a change of scene and working remotely

“A lot of what our team does is mine internal data to better understand just how people are using Tripadvisor – everything from reviews and specific businesses to particular locations”

specific US agency might require, because we’ve dealt with those agencies before; or what APAC needs for a particular tourism board. We get to capture the local nuance in a way that we might otherwise not be able to as a global company.”

An eye on the data

There are three broad areas of focus for her team: the first involves Tripadvisor’s proprietary data. “It’s so comprehensive, given the scope of our audience, the millions of businesses that partner with us and all the countries we cover,” says Gonzalez. “So being able to access that gives us a really comprehensive picture of travel behaviours, planning and booking that I think is hard to beat in many ways.”

She continues: “A lot of what our team does is mine that internal data to better understand just how people are using Tripadvisor – everything from reviews and specific businesses to particular locations. We look at the top destinations being searched, booking windows, whether people are booking more immediate trips closer to home, or if they are booking further in advance, and how that has been affected by things like the pandemic. I think it really helps us make smarter decisions and understand trends in travel. What we see on the site is often reflective of what else is happening in the market, so we’re able to make insights and a clear narrative out of it.”

Gonzalez’s second purview goes deeper into the ‘why’ of this data. As well as working with internal data, her team commissions studies with vendors and trusted research partners to dig deep into consumer travel sentiment: how are people feeling about it, are they nervous, are they excited? They look at what travellers are planning, what they are

filtering in their searches, and their spending habits.

Gonzalez offers this example: “We worked with Ipsos on a study that was published in Q1 and involved five markets, three of which were in APAC. We were able to use that to look at the year ahead in travel and travel intent – that helped us to flesh out some of what we were seeing internally.”

One of the main findings of the study was a renewed appetite for travel now that restrictions have eased, and a desire to experience new destinations and locations, as opposed to returning to the familiar. “It gives us this additional level of context to go alongside what we’re seeing internally; it’s such a good mix. It provides us with a really robust position in the thought leadership space around the what, why and how of travel.”

The third remit involves managing the digital ad effectiveness arm of the company. This is where the team is focused on working with the sales department to quantify the effect of running a campaign on Tripadvisor, in tandem with an insights partner such as Nielsen or Kantar. Gonzalez explains that this goes beyond standard campaign metrics, such as clips and impressions, to measure other KPIs that might not be captured without this study, including brand awareness, or purchase intent, or conversions.

Not one to rest on its laurels, Tripadvisor overhauled this part of the business in March to explore partners beyond the ones it has historically used, to provide a more tailored approach.

“This was done so that we were able to represent different budget needs and KPI measurements, as well as different regions,” says Gonzalez, adding that the company is now in conversation with various advertisers to implement these

in Galicia, northwest Spain, the country from which her family originates.

She is a veteran of the insights industry, having previously been head of video data and growth at Condé Nast Entertainment. Before that, she had a data analytics and market research remit at both Spotify and Google. With around 180,000 locations listed on the site, as well as 40-plus countries in which Tripadvisor has offices, her team of six has its work cut out and is tasked with covering Europe, the Americas and APAC.

Such a structure helps immensely in terms of identifying and resolving the specific needs of partners in those territories, as Gonzalez explains: “It allows us to truly understand what a



effectiveness studies as part of their campaign buy. Like virtually all operators in the travel industry, Tripadvisor is building back from “an incredibly challenging time”, as Gonzalez acknowledges. “Now that we’re seeing a fuller recovery, the challenge continues to be the need to make sure we’re bringing the right insights to the right people, so that they can keep on growing their business – ‘A rising tide lifts all boats’, as they say.”

Monitoring habits

All through the pandemic, the company was still monitoring users’ travel habits to try to discover where their interest lay, whether that was safer road trips, camping, or outdoor destinations.

“Even at the peak of Covid, consumers were still engaging with us, posting on forums and saying, ‘I miss travel’, so the team’s mission was to pivot on to the travel that was possible,” says Gonzalez. “Now the goal is to figure out how we

●
“Now that we’re seeing a fuller recovery, the challenge continues to be the need to make sure that we’re bringing the right insights to the right people, so that they can keep on growing their business”
●

partner with the right people and make sure we get back to where we were.”

The requirement to create custom insights can be demanding, as she recounts. “Full credit to the analytics team, they have been able to build out a range of insight dashboards, which allows people in our organisation to access a variety of self-served data around specific destinations, regions and hotels, which is super helpful.

“But we still have to do a lot of custom work – it’s exciting, but it’s not a one-size-fits-all approach.”

Gonzalez acknowledges that, while travel is evergreen, that is not always the case with insights. “Sometimes, things we pulled last quarter, or even last

month, might not be as relevant or might need additions, or something has shifted with time. The way we need to continuously update and rethink, or iterate, can be a challenge.”

Requests also come in all shapes and sizes, as Gonzalez points out. “Because we have so many requests, it might be a video chat, it might involve a Slack conversation, or it could be an email thread.”

Now that life is returning to normal, live events have re-entered the mix – and to good effect. “One of our senior managers has started attending in-person conferences again; he recently presented the results of a study that we did around travel dining at a quick-service restaurant



conference in the US, and that was really well received. A lot of the speakers were coming in with very transactional presentations, ‘This is what my company does’, that sort of thing. But we ran this study through Qualtrics [a Seattle-based experience management agency] and that allowed us to look at their category in depth and give them an idea of trends in terms of really understanding what travellers who visit those types of restaurants want.”

This then informed the outlets’ marketing strategy, allowing them to target specific groups, from families to solo travellers and those on business trips. “There were lots of good insights and takeaways that came from that,” remarks Gonzalez.

Digestible data

Sometimes, clients like the takeaways presented as an infographic, and Gonzalez’s team is currently working on one for the World Bank of Indonesia.

This, she explains, was a pure research project and not part of a media buy; it involved analysing internal Tripadvisor data on behalf of the bank over a period of three months for specific locations of theirs that they want to promote more. “They weren’t paying for media – they weren’t paying for that exposure; they were really after a data partnership.”

There were a lot of moving parts to the project, as she recalls. “We made sure that the owners were approaching listings the right way: whether they were claimed, whether they weren’t, what types of reviews they had received, how owners were managing the brand.” The upshot was a huge improvement in destination performance and a significant uplift in visibility for the properties in those key regions.

In terms of sharing the data produced by her team, one crucial point comes in the shape of ensuring that the insights are easily understandable for everyone involved, as Gonzalez elaborates. “This is

something that I think every research team deals with; there’s this line that we walk on a daily basis – the need to be rigorous with data, but then you have to distil it enough to make sure it’s suitable for the range of stakeholders you work with.

“You have to pick out what is needed for specific people, so their eyes don’t glaze over when you’re basically giving them a thousand charts.

“When we show a chart, our practice is to have a clear headline that actually says something about the results, like a key takeaway that the person viewing it should be focused on, as opposed to, ‘Here’s a whole load of numbers.’”

As she concludes: “You need to remember that they are not always data people; often, they might be a junior agency person, or somebody working with a government body. We always have to keep that at the forefront of our minds – it’s essential to make the data digestible.”



Time is money. Spend less.

The Twenty Minute Quote from Foreign Tongues.

Principal Sponsor of the MRS Excellence Awards 2022.



MRSTM

Excellence Awards 2022
Principal Sponsor

Call 0800 032 5939
www.foreigntongues.co.uk
translation@foreigntongues.co.uk

FOREIGN TONGUES[®]
The Market Research Translation Agency

What goes up, must come down



The macroeconomic and geopolitical landscape has seldom looked as uniformly stark as it does now. After 30 years of tailwinds from China, the world's workshop was shut for much of this year, with its zero Covid-19 policy imposing lockdowns across major cities and industrial zones. There is a global dearth of chips and components, with even a shortage of the chips to make the machines that make the chips. That's serious.

In Europe, Russia's invasion of Ukraine, with its impact on the global gas supply, has hit Germany particularly hard and paralysed Europe's engine for growth, the world's second-largest exporter. Elsewhere, in the UK, we stumble from the aftermath of Brexit's labour shortages (and the departure of 700,000 eastern Europeans) to Covid-induced tax hikes in the face of record inflation and rising interest rates, to a cost-of-living crisis exacerbated by the war in Ukraine, against a backdrop of supply chain issues and elevated freight costs.

Meanwhile, the US, the driver of the world's growth, is grappling with rising inflation and the first interest rate hikes in 20 years. A generation that has only known free money and sky-high tech valuations has been confronted by capitalism's harshest lesson. In a recession, capital is returned to its rightful owners. That is, from speculators and gamblers to investors and long-term grafters. An investment is only an investment if there is a return, otherwise it's pure speculation.

The Fed – which, historically, has ridden to the rescue by lowering interest rates during times of crisis – is now doing the reverse. The US consumer has a debilitating choice between a rock and a hard place – confidently spend savings and stoke further inflation, and consequently higher interest rates and possibly stagflation, or prudently save and plunge the country into a deeper and longer recession than might otherwise have been the case. Stark choices for stark times.

Against this unremitting backdrop, what does it mean for the markets and those tech growth stocks that powered the longest bull market in history, alongside the lowest interest rates known to man? Well, the future is as difficult to predict as the weather, but venture capitalists are probably the canaries in this mineshaft.

After all, they are the folk who generously subsidised the consumer in companies such as Uber, whose business model was loss-making, but predicated on disrupting traditional hackney cabs, capturing the entire market and creating a profitable (dare I say it?) monopoly. At least that is what it looked like to the uninitiated outsider.

Predictably, there are dire early warnings from operators on the tech frontline. The chief executive at Uber has written a chilling staff letter, some key phrases from which include that “some initiatives that require substantial capital will be slowed”; the least efficient marketing and incentive spend “will be pulled back”; “we will be even more hardcore about costs across the board”; and “in some places we'll have to pull back to spring ahead”.

There we have it. For growth investors and executives alike, the focus has changed from endless vistas of growth to back to basics. The pendulum has swung back as it always does, from boom to bust. Feast followed by famine as winter follows summer. The

emphasis now will be on balance sheet strength so that any downturn or recession is merely a question of timing and not terminal, as it will be for companies with high levels of leverage. Recovery will come, but we first need to pay for the good times.

To end on a more cheerful note, we can always rely on the indomitable

human spirit to adapt, survive and thrive. Things are never as bad as they seem, just as they are never as good as they seem. Take, for instance, the dire predictions of the collapse in central London property on talk of deserting the city for the countryside. Until, that is, a cold, boring winter pulled the young and able-bodied back to the excitement and bright city lights.

To underscore this, Shaftesbury and Capital & Counties Properties, owners of vast tracts of Soho, Carnaby and Covent Garden, confirmed in May that they were in advanced discussions regarding an all-share merger to create a new £3.5bn property giant. It will be focused on retail and hospitality space, together with office and residential accommodation in the West End of London. Undoubtedly, the opening of the new Elizabeth Line is helpful timing. After all, London survived the Great Plague, the Great Fire of London and the Blitz, to hold its place as the greatest city in the world.

●
“The focus has changed from endless vistas of growth to back to basics”
 ●

Doing what **you say**

People's recollections of their actions are often inaccurate compared with their observed behaviours. Liam Kay looks at the data 'say-do' gap that can be found in surveys

What did you do yesterday? Or the day before that? Can you recall your actions on 11 February 2021? If not, why would you assume a consumer can?

Survey data in market research can sometimes fail to capture the information that companies desire, looking at people's faulty recollections of past behaviours rather than observed actions, and using that as the basis of future analysis. The 'say-do gap' has been observed in numerous settings, in the physical retail world and in online shopping – but can it be measured?

Customer experience firm Disqo set out to measure the say-do gap across three shopping categories: automobiles, travel and groceries. The result was the report *Mind the Gap*, published earlier this year. The three categories were chosen because of the variety in typical purchase cost and frequency, which the company expected to impact the accuracy of respondent recall when asked about their purchasing behaviour.

The research used Disqo's consumer insights platform to survey a nationally representative sample of 53,749 consumers about their shopping behaviours, and then compared the answers with their actual digital behaviours collected over a 30-day period.

Only 'active shoppers' were included in the study, namely those who recorded five or more 'digital events' – such as keyword searches, website visits or mobile app launches – across the month.

"As traditional sources of digital behaviour data such as cookies, mobile IDs and IP addresses are getting harder to work with, because they are constantly being depreciated, some clients are turning towards asking consumers about their behaviours, rather than using observed behavioural signals," says Anne Hunter, vice-president of product marketing at Disqo.

"We wanted to see if that was an accurate substitution, or whether there were still requirements to have passive data collection."

The research found that an average of 49% of respondents were "highly confident" in their ability to recall their actions correctly, while 3% were deemed "not confident". However, 38% of respondents' self-reported shopping activities contradicted data on their real, observed shopping behaviours, highlighting the prevalence of the say-do gap. The say-do gap was recognised in all three product categories included in the study.

The biggest difference from the total respondent average was seen among active shoppers who said they had not shopped online in the past 30 days, even though online behavioural data suggested they had. Only 38% said they were highly confident in their recollection, a full 11 points below the respondent average; 12% of this group said they were not confident in their memories.

"The most shocking finding for me was the inverse relationship between people's confidence in remembering what they do versus their accuracy in remembering what they do," says Hunter. "The people who are most confident were also the most likely to be wrong. When researchers are setting up surveys, often the people who say 'I don't know' might be the most accurate, whereas the people who give an answer might be overconfident. Surveys need to be used to understand how people feel, as they are immediate, measurable reactions."

Take this example: if a survey asks people if they eat healthy food such as quinoa regularly, the respondents might not give the survey good information. But you could survey people who are actually observed buying it, and then ask them why they did so. That gives you the ability to market the product to gain more customers. Hunter maintains that behaviourally targeted surveys for people who already engage in the habit "gets you ahead of the trend".

Hunter uses the example of the environment, which is a top concern for many people who do not follow through their intentions when purchasing household items, for example, or choosing a car or holiday abroad. Convenience and money remain primary factors in why we make purchasing decisions, despite most people's concerns over climate change.

"Wants and beliefs are not always in line with our actions," Hunter says. "For better or worse, often our desires and hopes get ahead of our actions, which can inspire those actions over time."



A problem shared



I often think one of the hardest things about being an adult is answering the question, “So, what do you do?”. Sometimes, I work in market research. Other times, it’s analytics or data science, or research analytics. I consider myself lucky to be ‘cross-discipline’; it keeps my life interesting.

Another thing that keeps my life interesting are the tools I use across these disciplines. For the data science part of my role, I mainly use open-source computer programs. Open source is a bit like Wikipedia – written by the general public, accessible to everyone, and anyone can edit the pages if they want to.

Unlike Wikipedia, however, this doesn’t call the programs’ reputation into question – you won’t find university lecturers slapping students’ wrists if they use open-source programs such as R or Python, in the same way you would if they listed Wikipedia as a reference. In this case, it means there is a wealth of advice on the internet written by those who use and edit the code behind these programs. You’ll often find me copying and pasting error messages into Google, or asking “how do I... in R?” – and I know I’m not the only one. Even Hadley Wickham, a huge name in the industry, who is responsible for overhauling the building blocks of the coding language used in R, has said he’s the same.

Websites such as Stack Overflow are full of helpful troubleshooting tips, Q&As and code from other people you can copy and paste into your own work. The data science world is filled with people who want to help you, and the community is set up to enable that type of hive-mind problem-solving.

This got me thinking – what makes the data science industry different from the others I work across? I might be wrong – and please let me know if you disagree – but the market research industry just doesn’t seem as forthcoming in sharing the ‘nuts and bolts’ of the techniques and methodologies we use. I know, from helping organise various events in the research analytics world, that there is often a nervousness about giving away ‘state secrets’ to the competition. So, how do data scientists overcome this?

I asked the supportive network of those in that space for their opinions. A few key points were raised to explain how data scientists excel at helping each other, while also staying

competitive and true to their companies and clients, and I think the market research industry could benefit from similar thinking.

If there is detail on the internet about how to run a certain model, conduct a type of analysis, or use a specific methodology, it’s important to recognise that’s all it is. Most often, it isn’t the methodology your client is paying for – it’s you. You are the one who knows the client, their objectives and their needs; you understand the nuances in the market and in the data; you get how their consumers feel, and what the board wants to see. Using someone else’s code or research design can’t help with that critical contextual expertise. To quote Matt Squire, chief technology officer at Fuzzy Labs: “The general approach is open source; the application is secret sauce.”

Innovation breeds innovation. If we share our ideas, our techniques, our innovation, we will collectively innovate better, faster, and more efficiently. It’s that hive-mind approach, the give and take – I’ll give you this idea and take that one – that enables us to improve on what we have. If you are not part of this sharing and innovating cycle, you risk being left behind.

Most clients are, understandably, a bit nery about paying what can be thousands of pounds for something unproven, untested, brand new and out of the box. So, sharing, testing, improving and making these

techniques fail-safe before spending clients’ money on them is another win-win situation. You can iron out kinks in the details before it’s too late. New techniques are only helpful and meaningful if we can use them in a real-world setting. A new wizzy methodology that nobody trusts is worthless.

I’m not saying the market research industry doesn’t do any of these things. Conferences are held all over the world where people share details of the projects they are running. There are small pockets of individuals keen to share thoughts and ideas to keep that innovation turning – the Advanced Data Analytics Network from the Market Research Society, the Association for Survey Computing, and the Sawtooth community are just a few.

What I am saying is that I believe we could get better at this. After all, why wouldn’t we want to improve our work and our networks, and learn a thing or two along the way?

●
“If we share our ideas, our techniques, our innovation, we will collectively innovate better, faster, and more efficiently”
 ●

A glass half empty?

Optimism is a valuable tool for most businesses, but if the feel-good factor declines, what is the financial impact of that for brands? Liam Kay finds out

It is a hard time to be an optimist. We are emerging from a worldwide pandemic; facing a cost-of-living crisis driven by spiralling fuel and energy prices and higher inflation rates; the effects of human activity on the environment are increasingly becoming obvious; and war has broken out in Ukraine, leading to a knock-on effect on food and supply chains. The future is not looking so rosy.

With a few notable exceptions, businesses generally trade on optimism and goodwill in their advertising, products and brand image, whether that be a new car, house, investment tools, or simply food and drink. But is the current political and economic climate affecting that formula – and is the loss of optimism part of a longer-term trend, or an unsustainable blip?

Much of the current loss of optimism is reflected in consumer confidence figures. GfK's Consumer Confidence Index fell to its lowest levels since its records began, in 1974, in its May edition, reaching a score of -40, one point lower than the 2008 financial crisis. Joe Staton, client strategy director at GfK, says the cost-of-living crisis is the leading cause of economic pessimism.

"My glass feels rather half empty at the moment, looking at the numbers," he says. "I cannot find any strong tailwinds that will boost consumer confidence. The headwinds are phenomenal. Consumers are similar to markets – they trade on confidence and surety."

Market research firm Trajectory has been running an optimism index since 2018 and has also noticed a recent collapse. The April 2022 index said 39% of us felt life had got worse during the past 50 years and would continue to decline over the next 20, compared with 37% who said the opposite.

The cost-of-living crisis is a big factor in the fall in optimism, but other factors are at play. Trust in politicians is "having an impact on optimism in a way it doesn't normally", explains Tom Johnson, managing director at Trajectory, as is nostalgia for an idealised past and levels of personal autonomy. Johnson adds that financial pressures, social fragmentation and declining trust in leaders are combining to create "a different consumer and citizen mindset".


Darren Savage, chief strategy officer at Tribal, says some evidence points to the younger generations being more optimistic as they "have grown up in a much more connected and participatory culture, and they feel that, through such participation and connections, they can effect change".

Trajectory's optimism index also supports the idea that younger generations are more likely to be optimistic about the future than their parents.

It found that the Silent Generation, millennials and Generation Z were the least nostalgic, whereas the Baby Boomers and Generation X were most likely to feel things were getting worse.

The environment is one of the big elephants in the room when we discuss humanity's innate optimism, or perceived lack of it. With the climate crisis likely to accelerate in the decades ahead, Savage thinks there is a disconnect – "it is so

●
"It is so horrific, so appalling what is happening to this planet, that many people are in denial about it"
●



●
“Things like sustainability and good ethics from a business are playing a much more central, critical role”
●

horrific, so appalling what is happening to this planet, that many people are in denial about it”.

He cites the 1973 book *The Denial of Death*, by Ernest Becker, as an example of this disconnect and says that brands need to help change mindsets. “The best way to predict the future is to invent it,” he adds. “I hope that some time in the future people can unify with a vision of what the future ought to look like, and it is not caught up in nationalism or nostalgia. The planet needs some genuine visionaries.”

Johnson says part of the overall problem is humans’ inability to notice gradual improvements in living standards and failure to spot incremental change. “If life expectancy increases by a few weeks every year, then we are obviously not going to notice,” he says, adding that there are good reasons why optimism is declining – namely, life is not improving at the rate it was a few decades ago. Real wages have been flat for decades, life expectancy rises are slowing and the economy is no longer growing. “We would still make the case that life is getting better for other reasons, but, increasingly, the big things we used to point to don’t really support that any more,” adds Johnson.

A “them and us mindset” is affecting shopping habits, he says, and people are getting excited over bargains not just because of the money saved, but “because they were getting something back from ‘them’ – being big business or whoever is ‘winning’ from all of this; we, the people, are in it together, and wealthier, elitist business and vested interests are on the other side”. Companies that raise prices are running a risk, as “consumers are able to see who is on their side and who is not in that context – some of those memories will remain long after this painful period”, Johnson adds.

Savage explains that businesses can be well positioned to lead an upturn in optimism, but they must examine what people need and want from brands. “Brands should always offer people, both at a symbolic level and how they deliver on a brand promise, something that improves your life in some way, shape or form,” he says. “I think things like sustainability and good ethics from businesses are playing a much more central, critical role.

“There is an opportunity for brands to offer a more optimistic view of the world. Humans are fundamentally optimistic. When you look at things from a psychological point of view, it doesn’t matter how bad things are at the moment, everyone has a degree of optimism. It is a survival mechanism – I don’t think we could survive and stay sane unless we had an ability to believe that, at some point, things will get better and improve for us.”



Behind the bot

How influential are bots on social media? Liam Kay looks at a recent study examining the role that bots play in spreading misinformation

Think back to the morning of 24 June 2016. Many people were in shock, having woken up to the news that the UK had voted to leave the European Union. For them, the result went against all expectations and, in the years afterwards, a reason for the outcome was sought. Some believed bots – automated accounts present on social media sites such as Twitter – were to blame for distorting the vote.

There is a lot of evidence that bots were present in the social media debate surrounding the EU referendum. In 2017, a University of London study by Dr Marco Bastos and Dr Dan Mercea found 13,500 Twitter accounts were tweeting extensively about the Brexit referendum, only to disappear soon after the vote. The bots had posted 65,000 messages over a four-week period, which the researchers said were slanted in favour of the leave campaign, albeit with many messages also pro-remain.

Bots have since been observed at other major political and social events, such as the 2016 US presidential election and the initial wave of Covid-19 in 2020. Bots have also been blamed for the flood of misinformation that swirls around many online debates and associated rises in conspiracy theories.

Do bots deserve their bad reputation? Can they actually turn election results or cause people to adopt extremist views and political stances? University of Edinburgh researchers Abeer Aldayel and Walid Magdy investigated the role bots play in the spread of misinformation in their study *Characterising the role of bots in polarised stance on social media*.

Their study analysed a dataset of more than 4,000

Twitter users who expressed a stance on seven topics: Hillary Clinton; climate change; feminism; abortion rights; atheism; Brexit; and immigration. Those users' direct interactions and indirect exposures with more than 19 million accounts were then investigated, with bot accounts identified.

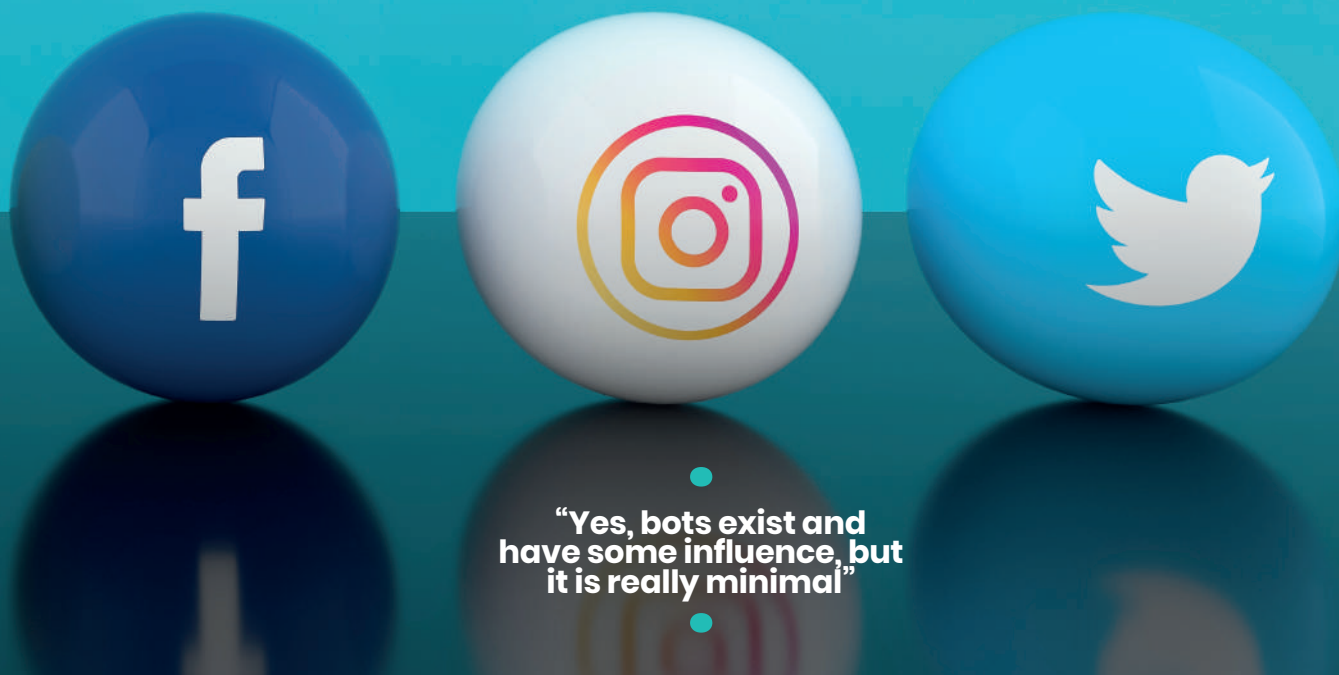
The supporting/opposing stances were noted and compared with other types of accounts, such as those of influential and famous users.

The researchers looked at two types of network: interaction and exposure. The interaction network is, broadly, the accounts with which a user retweets and interacts. The exposure network is the ones they follow and to which they are exposed. The results found that, generally, bots were far less effective at spreading misinformation than the accounts of influential users.

Bot interactions with users who had specific opinions or political stances were minimal compared with influential accounts with large numbers of followers. However, the presence of bots was still connected to users' views, especially in an indirect manner – users were exposed to the content of the bots they follow, rather than by directly interacting with them by retweeting, mentioning them or replying to tweets.

“We found some bots were influential, but they were really minimal – we are talking about 5% or 6%,” says Magdy. “Yes, there are bots; they might have some correlation with our opinions, but we are not seeing them influencing it.

“A tweet from someone like Donald Trump or Barack Obama will be more than 10 times more influential on your opinion compared with bots. Yes, bots exist



and have some influence, but it is really minimal.”

There is also a misunderstanding of what bots actually are and the role they can play online. Unlike many other social media platforms, Twitter allows accounts to post tweets automatically, which has led to many bots being created, a minority of which are used in harmful ways.

Most are used positively, however; for example, Wikipedia runs an @EarthquakeBot account that gives updates on earthquakes above five on the Richter Scale. Twitter also has rules in place to prevent automated accounts from spamming users or sending unsolicited messages.

Magdy says there is a fear of bots that is generally not supported by their actual impact on public discourse. “That fear might be overrated. Focus on the influential

users,” he explains. “It is like shouting a lot in a closed room – nobody hears you much and it does not have much effect.”

Some social media platforms, such as Facebook, do not allow bots (although Facebook does have an issue with fake accounts).

“Each [network] has its own nature,” Magdy says, adding that Twitter is one of the most popular platforms for news dissemination, making the spread of misinformation on the site more worrying. “When we talk about misinformation and stances about any topic in general,” he says, “we noticed bots are there but don’t have much influence.”

The problem with tackling bots is determining which are malign actors and which remain useful. There is also a big spectrum of what constitutes misinformation. There are various shades of grey between the outright falsehoods and the complete truth – for example, using cherry-picked statistics or false equivalences. Magdy is working on a project to understand why some people do not check information they see online and the common characteristics between them: “Disrupting the sources [of misinformation] would be great, but can we find a way to stop the consumption as well?”

Even in the context of Brexit, however, Magdy questions how much of an impact bots had on the result. “Even if it is 30% [of accounts on a social media network that are bots], they still don’t have much impact,” he maintains.

“Yeah, there are bots everywhere. The media amplified it and made it a big problem, and said that it changed votes – but that’s too big a conclusion.”



Nothing but a number



We listen to the Queen, currently enjoying her platinum jubilee. We watch David Attenborough, who is well into his 90s. We see Naomi Campbell – a new mother aged 50-plus – walk down the catwalk with girls less than half her age. In these cases, and many more, chronological age has little relevance and reflects only the passage of time.

Despite such salient role models and heroes, our industry can still be over-reliant on chronological age to guide consumer research and recruitment. Many researchers believe there is a need for a more sensitive and enlightened approach to thinking about age, and to give more weight to factors such as lifestyle, quality of life, experience, life stage and even how old people feel, rather than how many years we've been around.

A recent review found that a lot of research is still conducted using chronological age. Yet, we've known for ever such a long time that chronological age is an unhelpful way of categorising people; in fact, many in the industry now recruit against contextual factors rather than age. That's because a single number masks the breadth of diversity across older people.

Although we start off very similar as children, we encounter diverse life experiences as we go off on many different tangents. Robert Butler, a psychiatrist who directed the National Institute on Aging in the 1970s, commented, even at that time, that getting older “brings more individuality and diversity than uniformity”.

What's more, we are living longer than ever before, meaning paths diverge ever wider. Just 100 years ago, in 1922, life expectancy was only late-50s, while a 40-something today can expect to live until their mid-80s and the new alpha generation has a reasonable chance of living to 100. That means divergent life experiences will be even greater, with a wide variety of opportunities, experiences and tangents.

Such choices and life events can also impact on our lifestyle, which, in turn, impacts on our health and physical ageing. Those in sedentary jobs, or jobs that carry health risks, are more likely to age faster in biological terms. Some diseases and illnesses can also accelerate physical or cognitive decline. A recent study found that those hospitalised with Covid during the first lockdown suffered cognitive impairment equivalent to the loss of 10 IQ points – or 20 years of ageing seen between age 50 and 70 – that they are never likely to regain completely. Equally, chronic stress and lack of social contact can accelerate ageing. Loneliness can

lead people to die much earlier than people with healthy, quality relationships and social contact.

By the time people reach their 50s and 60s, there is already such a wide divergence in life experience, cognitive ability, physical prowess, health, behaviour and beliefs that chronological age becomes meaningless. In fact, in some less developed societies, people often don't even know their age, and their peers relate to them – and place them – according to their life experience, life stage and knowledge.

Yet, in the West at least, we remain wedded to this now arbitrary number. Behavioural scientists describe this as anchoring – giving too much weight to a single piece of information to make quick judgements and decisions.

We tend to assume that, past a certain age, people's cognitive ability declines. Yet, staying in work has been found to lessen cognitive decline in several studies across different locations. One study even found that returning to work after briefly retiring boosted cognitive function again. Therefore, recruiting a 70-year-old participant who is in work may lead to very different insights from someone of the same age who is retired.

Retirement is a relatively modern concept; in parts of Japan, there is no such word – and we may be reverting to a world where retirement is a relatively smaller phase of life than it has been recently. The pandemic led to a blip of earlier retirement, but, before then, people had been staying in work for longer, either because they had to for financial reasons, or because they wanted to.

With the recent rise in state pension age in the UK, the latest figures show that the male employment rate at age 65 rose to 42%, the highest it has been since the 1970s. Similarly, the female employment rate rose to 31%.

We also assume that younger entrepreneurs tend to be more successful. However, analysis by Pierre Azoulay and colleagues at MIT's Sloan School of Management found that older entrepreneurs have a substantially higher success rate. They concluded that entrepreneurial performance rises sharply with age before peaking in the late-50s. Founders of high-growth start-ups were 45 years old on average when they started the company.

If we reject chronological age as a useful segment, what can we draw on instead? Other indicators, such as the following, may be much more useful: subjective age – simply how old someone



●
**“Staying in work has
 been found to lessen
 cognitive decline in
 several studies”**
 ●

feels or thinks of themselves; biological age – biomarkers can show degradation and damage to tissues, and changes in metabolism; social age – influenced by the perception and expectations of different ages in a society’s culture. Some societies view being older positively, others much less so; psychological age – emotional development and maturity, cognitive ability and experience.

These indicators can reveal far more about someone than their chronological age. A 2019 company study measured a number of indicators across a sample of 229 employees and was able to identify three types: youthful, mature and veteran. They asked employees questions about their cognitive and physical age, how old they looked and felt, how able they were to work productively, their health, and how engaged they felt at work. The three groups scored very differently across these indicators. Of course, these are all self-reported findings; if we could observe and record actual behaviour, that would also give us a set of more objective indicators.

As researchers, how can we research the older audience in new and exciting ways, inspired by these insights from behavioural

science? Can we cut ourselves free from misleading chronological age and consider other pieces of information as well, to create a multidimensional picture?

Think about how we might segment by subjective age, asking questions such as “How old do you feel?”

Recruiters can get a sense of biological age and psychological age by asking people what life stage they are at – for example, grandparents, still in paid employment, voluntary work, hobbies, and so on. We can also take into account someone’s family history, diseases and past and present lifestyle, including factors such as diet, alcohol consumption and smoking.

We can assess how physically active and able they are, whether they have suffered any disabling illnesses or injuries that may take years off their physical life or cognitive abilities, their mental aptitude, and quality of social connections. Most biomarkers need a clinical assessment, but a few – such as blood pressure – are often known by the participant or are easy to measure. Ultimately, we need to build new dynamic frames and anchor points for an industry that is still over-reliant on the concept of chronological age.



Research Fulfillment

THE COMPLETE SOLUTION

Products Direct To: Respondents | Interviewers | Halls



*Products Online Ltd are able to offer your company
a complete marketing support service.*

Whether you are involved in market research,
manufacturing, advertising or exhibitions,
we are able to offer a comprehensive service
tailor made to your requirements.

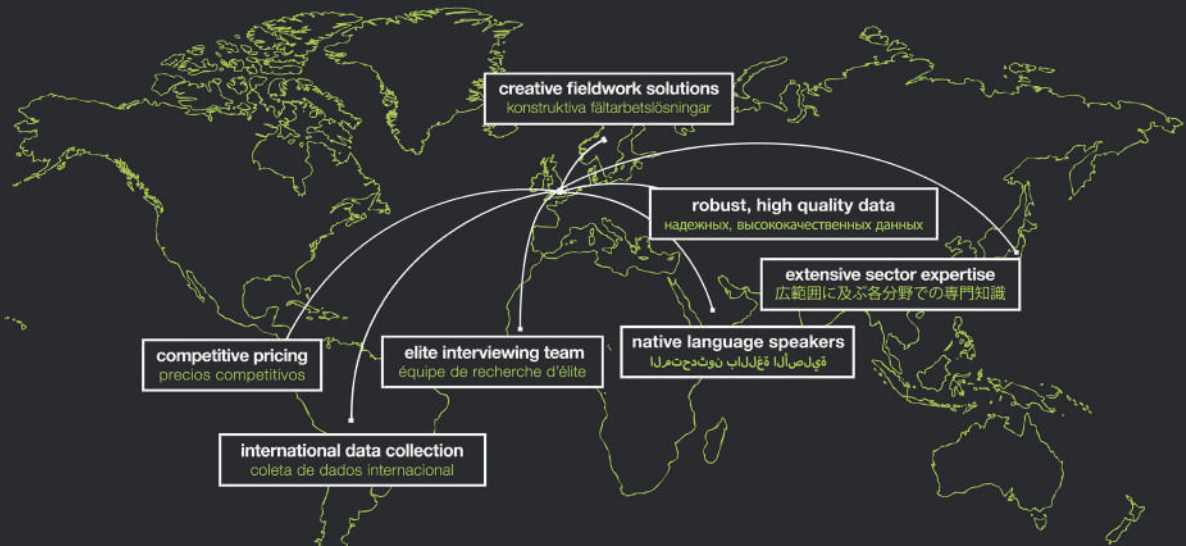


+44 [0]1604 230 066
www.mlsnorthampton.com

**kudos
research**
www.kudosresearch.com

**kudos
health**
www.kudos.health

Your expert partner for UK & Global Telephone Data Collection



The engine behind great research

For further information, please contact:

Chris Smith CSmith@kudosresearch.com, Efisio Mele EMele@kudosresearch.com or Volker Balk VBalk@kudosresearch.com



Specialists in fast turnaround projects.

Experienced in all methodologies

- F2F interviewing across UK, including NI
- Qual recruitment
- Tablet/Paper/Telephone interviewing
- Postal Surveys
- Online
- Coding, Data Entry and Tabs

For the best quote possible or just to chat about your options contact Lisa Stringer or Carol Timson

Email: Enquiries@dataoptions.co.uk
Tel: 0161 477 9195

To Advertise
Please contact

Alex Pout

on **020 7566 1844**

How to beat burnout

The importance of creating an inspiring environment where employee wellbeing can flourish is becoming ever more critical. Stephanie Rowley talks us through the smartest ways to deal with workplace stress

Burnout and exhaustion are becoming ever more prominent in the research industry, with heavy workloads and impending deadlines cited as the main causes.

But as a leader, how do you deal with this? Running a successful business depends on a healthy flow of work – so what do you do when the very thing that is keeping your company afloat is the same thing that is dragging your people down and burning them out?

Here are five factors to bear in mind to enable you to start tackling the problem of overwhelming workloads and challenging ways of working at source.

Face facts

The first step in dealing with a problem is acknowledging that it actually exists and understanding where it's coming from.

It's time to take a hard look at things and face the truth. As a leader, have you made it your



business to really understand what's going on within your team? You might know people are busy and stressed – but have you dug beneath the surface to understand specifically what is causing the stress, where the key challenges are, and what impact it's all having?

The first thing you can do is put some time into a full and frank evaluation of workloads, ways of working and wellbeing in your company. Where are the pressure points? What would make things easier for people? Are you doing all that you can to relieve the pressure – or are you just papering over the cracks? Talk to your team, listen to them carefully and be brutally honest in your analysis, as painful as it might be.

Focus on prevention, not cure

Offering your team mental health days, lunchtime yoga and the like is nice, but it's not the whole answer, because they put the onus on the individual to cope better with the problem that their workplace has created.

There's definitely a role for these initiatives, but do they actually help when you've got more work than you can handle; when you have a deadline that means you're going to have to work late into the evening, or at the weekend... again? I'd argue they don't, because there isn't time to take advantage of them properly.

Consider how you can remove the problem, rather than just giving people ways to cope with it. I know how challenging this is. The obvious solution to overworking is having less work, or employing more people, both of which come at a cost, and that is what makes this problem so difficult.

But we are researchers, so turn all those skills that you have – analysis, and creative and strategic thinking – towards your own business. What can you do to take away the problem?

Look at your systems and processes, your tech, your pricing models, your culture, your client relationships – and start making changes.

Maybe you need to be bold and brave in the choices you make; consider the impact on your team of creating healthier, more manageable ways of working... and, in turn, how that will affect their performance.

If cost is still a barrier, consider this: by not addressing this issue, people will burn out and leave, and your business will get a bad reputation – and that surely is too high a price to pay.

●
“Let's start an honest, transparent dialogue and find a way to deal with the pinch points that cause undue stress and pressure”
 ●

Get better together

All of us, agencies and clients alike, face pressure – and all too often, I think, we pass it around like a hot potato, trying to offload it on to others, or make it 'their problem', rather than addressing where it's coming from and how to solve it together.

I firmly believe that we need to work better together to understand each other's challenges. I'm also of the opinion that the industry will never see the change it needs unless this happens.

So, why not start talking? Open the doors of communication with your clients or agencies. Nobody wants to be burnt out or overwhelmed. Let's start an honest, transparent dialogue with each other and find a way to deal with the pinch points that cause undue stress and pressure. It's not the whole answer, but I would argue that a shared commitment to a healthier, less stressful way of working has got to be a great start.

Walk the walk

Your influence as a leader is of the utmost

importance. It's impossibly difficult for people to address their crushing workloads if their bosses don't take control and lead by example. Mixed messages result in confusion and resentment – so don't tell people their wellbeing is important, but then set a culture that creates stress and overwhelms them.

Don't tell your team that it's OK to say no, push back or switch off, if those are things that you don't do.

You need to give your team permission, and enable them to trust you, and the best way to do that is through actions, not words.

The bottom line is this: no matter how flat your organisational hierarchy, our brains are hardwired to copy the behaviour of the higher-status person. Don't underestimate the significance of this. 'Do as I say, not as I do' doesn't work with kids, and it doesn't work with adults either.

Don't leave it to luck

My final piece of advice is simplicity itself: do not leave people's wellbeing to luck. By not taking action, that's precisely what you are doing. Hoping for the best is not a good business strategy. People will burn out and they will quit – that's the one thing that is certain. Be prepared to commit yourself to real, meaningful change.

● *Stephanie Rowley is an executive coach for research and insights professionals*

Pillar of society



Businesses have a collective responsibility to moral and ethical codes; this includes a responsibility to closing disparities of inequality, alleviating climate change and supporting small to medium-sized enterprises, and voluntary, community and social enterprise.

The importance of social value in procurement is becoming more apparent each day. At the heart of it, social value in procurement is about ensuring that what we buy is generating value and benefits for people, stakeholders and society. Now more than ever – particularly in the context of the Covid-19 pandemic – there is a need to turn our efforts and attention towards improving social and environmental outcomes.

The Royal Institution of Chartered Surveyors refers to social value as the impact that a project or policy has on society, and the value that these impacts have, both positive and negative. The social value of a project is the net value generated to society (ie, net of negative impacts). The term ‘social’ refers to the aggregation of the individuals that make up society and not – as it is often framed – to a type of impact. Social value captures a myriad of impacts, including on the economy, the environment, health, education – these are all valuable products vital to society and to human lives.

‘Social value’ requires us to rethink how scarce resources are allocated and used. It involves a paradigm shift – from valuing the contract to giving greater value to the societal and collective benefit to society. The UN Sustainable Development Goals are widely adopted as a model to develop social value mechanisms and compel commissioners and suppliers to widen their positive impacts through investment, transformation and regeneration. Social value doesn’t compete with value for money; it is an essential element of it.

The Public Services (Social Value) Act came into force on 31 January 2013. It requires businesses that commission public services to consider ways in which they can secure and/or improve wider social, economic and environmental value. Before businesses begin the procurement process, commissioners should think about

whether the services they are going to buy, or the way they are going to buy them, could secure these benefits for their area or stakeholders.

The act is a tool to help commissioners get more value for money out of procurement. It also encourages commissioners to engage with their local provider market or community to design better services, often finding new and innovative solutions to challenging problems.

In June 2018, central government announced it would go further and explicitly evaluate social value when awarding most major contracts. As part of the Social Value Act, government departments will be expected to report on the social impact of their major contracts.

The Cabinet Office and the Department for Digital, Culture, Media & Sport (DCMS) have worked with departmental commercial and policy teams, and supplier representative

bodies, to develop a Social Value Model, which commissioners can use to better understand how to enact the Social Value Act.

Government has defined social value through a series of priority themes and policy outcomes (borrowing from the UN Sustainable Development Goals), which are important to deliver through the

government’s commercial activities.

The Social Value Model provides a comprehensive approach for departments and suppliers, and the objective is to streamline and standardise the procurement process. The model has been designed to seamlessly work into existing processes – minimising unexpected large changes and the impact for commercial teams and suppliers – and provides a clear, systematic way to evaluate these policies in the award of a contract.

Social value will be evaluated based on qualitative responses from bidders, and not on volumes. This means that larger suppliers are not able to win on scale alone; all bidders are required to set out what they will deliver and how it will be delivered, and it is this information that will be scored in bid evaluations. The minimum weighting that should be applied to social value is 10%.

Procurement in market research provides information

●
“Social value involves a paradigm shift – from valuing the contract to giving greater value to the societal and collective benefit to society”
●



that is critical to developing meaningful and effective procurement strategies.

When the UK government procures market research, it is procuring intellectual capital and evidence that is important to decision-making. Market research enables procurement to better understand, among other things, how the supply market works, the direction in which the market is going, its competitiveness, and the key suppliers within the market.

Commissioners procuring market research should consider:

- Integrating social value into market research across all levels of the project – from the field/ground and high level
- Engaging with researchers and others involved on the ground. Looking at how to provide more value to the community
- Acknowledging already successful projects – for example, recruitment and training processes, apprenticeship schemes, and so on.

The Market Research Society (MRS) has already made great

strides, including work and commitment to a net zero strategy and diversity, equality and inclusion (DE&I) goals, as well as training and employment.

In November last year, the Crown Commercial Service (CCS) launched its new research and insight marketplace, Dynamic Procurement System (DPS), for the procuring of research and insight across the public sector. The new DPS includes the MRS Net Zero Pledge as one of the options for suppliers to demonstrate their social value and carbon-neutral plans.

By including the pledge in this way, the CCS raises the profile of the MRS Net Zero Pledge among the 200-plus suppliers that are expected to register on the DPS, as well as those public sector commissioners who procure from it.

Although the selection questionnaire itself does not mention the MRS pledge as an option (because of procurement policy regulations, this is not possible), the CCS has informed all suppliers of its inclusion in the system.

Save up to

30%

As an MRS member
or company partner

SHARPEN YOUR INSIGHT EDGE

The widest, most relevant
range of research, insight and
analytics training in the UK.

Courses are delivered in live
virtual classrooms.



MRS Training | Giving you fresh focus to go further, faster.

Search:

MRS Training

Contact:



training@mrs.org.uk



020 7566 1872





Bringing the world together

This July, the Market Research Society (MRS) is celebrating the international research community and the strong network of overseas members and customers we have grown over the years. We do this in the spirit of the International Day of Friendship, which the UN established in 2011, and which takes place on 30 July each year.

Readers of this magazine will know that research plays a fundamental role in helping people understand one another, both within and across borders. But we all need to keep reminding those outside of our industry just how our work influences the real-world decisions around them; not just in the products they buy and the services they use, but in the geopolitical landscape – across societies and cultures, people and places.

Fostering this understanding has never been more urgent than it is now. Notably, to give voice to marginalised and oppressed people, and to help combat disinformation and fake news which is intended to create division and disharmony.

As our many advertisers and commercial partners appreciate, MRS has built up strong communication channels that have been international in their reach for many years: the IJMR, the Research Buyers' Guide and Research Live, to name just three. Web traffic to mrs.org.uk and

[Research-live.com](https://research-live.com) is predominantly international, accounting for well over 50% of the 50,000 unique visitors we receive across both platforms every month. Our news, reports, case studies and guidance are eagerly anticipated and read by research, insight, data analytics and marketing professionals around the world.

The volume of training courses delivered to overseas members and customers has more than doubled in the past year, with particularly strong uptake in Germany, Ireland, Switzerland, the Netherlands and the United Arab Emirates. We are also delivering training as far afield as Lebanon, Barbados, India and Saudi Arabia.

The MRS International Affiliates programme is flourishing, and as well as renewing organisations such as NATO, we've just welcomed new affiliates Lovebrands (France, UK) and Diakob (Australia). Our annual celebration of Research Heroes (mrs.org.uk/heroes) included nominations from India, Vietnam, Australia, North America and Europe.

This small snapshot of our international activities (see overleaf for more) demonstrates MRS's commitment to joining up the amazing work our colleagues around the world are doing. All our lives are inextricably connected, and research and insight should be understood within the context of our shared global existence.

Sector and MRS news

Diversity & Inclusion Best Practice guides

The MRS Client Council has developed and published three new Diversity & Inclusion Best Practice guides on sampling, methodology and language. The first of their kind in the UK, these comprehensive guides act as a framework for research professionals to help ensure diverse sampling and inclusive methodologies.

Prepare for ISO 20252: 2019 Certification

LMRS has produced a Guide for Research Suppliers to prepare for ISO 20252: 2019 Certification – 23 Steps to Certification, which is free to company partners. Although the ISO 20252: 2019 standard is not mandatory for members and company partners, MRS supports it. This guidance has been created to enable research suppliers to meet the requirements of the revised 2019 standard and to assist non-certified companies to achieve ISO 20252:2019 certification. www.mrs.org.uk/resources

Biodegradable membership cards

All members will now receive a fully biodegradable membership card when they renew or sign up to membership, in a small step towards making the research sector more sustainable.

Making the most of your membership

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

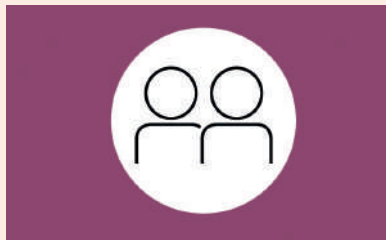
Specialist reports



Access the MRS Delphi Group specialist reports

Read the latest thought leadership reports written by the most respected thinkers in the marketing and research sectors. The latest report, *The rise of the insight alchemist: how the data explosion has created a new breed of insights professional*, explores how brands including Tesco, Unilever, Spotify and M&C Saatchi have figured out an elegant solution in the form of balanced skills and structure. As a member, we make sure you hear about the latest reports and insight first.

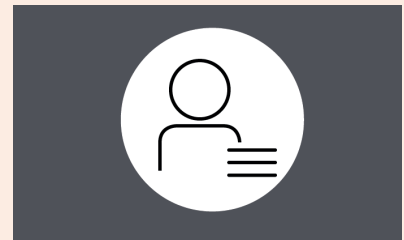
Mentoring Scheme



Give your career a boost with our specialist Mentoring Scheme

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

Your preferences



Manage your account details and renew online

You can update your details, as well as renew your annual membership within your MyMRS account. You can manage your marketing preferences, with opportunities to sign up to emails on training, conferences, news and reports. Plus, if you would like to connect to other members, you can opt into the MRS Member Directory to display your name, photograph and job role. At MyMRS, you get access to your membership benefits in your online account – see details below on how to get started.

Access your benefits

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

www.mrs.org.uk/membership/benefits

Diary dates

Conferences

Sports and Gaming Research

At this face-to-face conference, discover how digitisation, along with new phenomena such as NFTs and the metaverse, are attracting more diverse audiences to these sectors.

7 July

Professional webinars

Fusing research, tech and AI

Learn how four major brands are using semiotics, social intelligence, AI and primary digital research to deliver depth at scale.

8 July

Football and 'fan centricity'

What makes football fans so emotionally connected to the clubs they support? Hear from the fans of top-flight teams in four leading European football nations.

23 September

Training

Scenario thinking

Understand the role of scenarios in planning for uncertain futures, and analyse the role of insights in creating and applying successful scenario thinking.

7 July

Professional webinars and speaker evenings are free for members.

For information on all MRS events go to

www.mrs.org.uk/events



How to be insightful

This new workshop provides a novel and practical framework for generating more powerful and impactful insights from the masses of data we all face every day.

11 July

Qualitative research masterclass

This advanced course covers the next level of qualitative research, including semiotics, ethnography, discourse analysis and creativity work with consumers.

12 July

MRS Summer School

This three-day deep dive into the world of research enables professionals with a few years' experience to develop deeper skills and keener commercial awareness.

13, 20 & 27 July

Strategic management skills

For those about to take up their first management role, this course offers the opportunity to benchmark your current skills against professional management models.

14 July

Facilitating action from insight

Learn how to apply leading-edge stakeholder management and facilitation skills to influence representatives across different business functions.

19 & 29 July

Creative videos for storytelling

Discover the art of combining narrative and visuals, filming and editing, and how to do it all on the tightest budget possible.

21 & 22 July

Moderating masterclass

This one-and-a-half day course provides an understanding of group dynamics, including self and respondent management and handling difficult situations.

26 & 28 July

7



Dr Kenny Monrose, researcher in sociology and a fellow of Wolfson College, Cambridge, is lead researcher on the Black British Voices Project and author of *Black men in Britain: an ethnographic portrait of the post-Windrush generation*. He has worked with Middlesex University and the Mayor of London's Office for Policing and Crime on services for young crime victims

1 What is the biggest issue facing the UK criminal justice system?

Cyberspace is the largest platform where crime takes place and that has impacted on community policing, meaning policing by consent has, to an extent, become a thing of the past. As a result, an even bigger gulf has emerged between some communities and enforcement agencies who engage only during a situation of conflict, to the point that the relationship between the public and the criminal justice system has crystallised into one of 'us and them'.

2 What accounts for the tense relationship between black communities and the police?

Our research with black communities has highlighted that the issue is not about policing as such, as it is accepted that the police service is, of course, a necessity. The concerns surround what is considered bad, insensitive over-policing.

3 Do you think the Windrush generation is starting to get proper recognition?

The achievements and struggles of black people in this country have always been recognised by those who pay attention to their experiences. Books about the so-called Windrush generation have been written into British history for more than 50 years. It's only since 2018, and the emergence of the shambolic way people

from the West Indies are treated, that the mainstream has paid attention to their plight. For Caribbean arrivals, the hostile environment policy didn't start in 2012, with Theresa May; it began on 23 June 1948, the day after they arrived at Tilbury Dock.

4 What has Covid-19 exposed about societal and racial divides in the UK?

The pandemic highlighted the silent disparities that minority communities in the UK are subject to, meaning that these social divisions are not simply limited to educational attainment levels, unemployment rates and unevenness within the housing sector, but are evident within all sections of society, such as health provision and the workplace. Even during a pandemic, the enduring ugliness of racial discrimination manifested itself.

5 What do you hope the Black British Voices Project will achieve?

The project provides an authentic, uncompromised and reliable account of black British life. It has collated granular data on vibrant communities whose positive contribution to British society has often been overlooked. The project gives a route of communication for black communities to recalibrate narratives that are not limited to migration and settlement, but include stories of empowerment, creativity and solidarity that have provided a cultural uplift to

British society. The rich data gleaned from the research can be used to better inform policy decisions.

6 How do you think black British identity is evolving?

Identity politics are in flux, and the classifications of black people in Britain have shifted during every decade. The most recent term, BAME, has been criticised for being clumsy and unhelpful by conflating the experiences of all racial and ethnic groups. Getting definitions right is important. A good example is the term 'the Windrush generation' – those from the Caribbean never once referred to it themselves; onlookers did. I'm happy to see terms such as BAME rescinded. An important step is to grant black people the agency to define themselves, as opposed to having a label attached to them.

7 Do you feel optimistic for the future?

In terms of race relations, I must feel optimistic. None of us is beyond race, because, like it or not, it acts as a social register and identifier. My hope is that we get to a place where race, phenotype or skin colour is regarded as the least important aspect of who we are as individuals. What encourages me is the increased awareness and racial literacy among young people of all races, and their willingness to call for the eradication of racial discrimination and disadvantage.

Build your research excellence

Enhance your professional expertise in 2022 with membership, training, awards, webinars and virtual conferences.

 <p>Training and Qualifications</p>	 <p>MRS Awards</p>	 <p>Research Jobfinder</p>	 <p>The Research Buyers Guide</p>
 <p>Annual Conference</p>	 <p>One Day Conferences</p>	 <p>Company Partner Accreditation</p>	 <p>Impact Magazine</p>
 <p>Membership</p>	 <p>Research Live</p>	 <p>Webinars</p>	 <p>Excellence Awards</p>



www.mrs.org.uk



Directory sponsor

OnePoll

The Research Buyers Guide

Build your business with overseas opportunities

50%

increase in traffic in the last year, with **4,000+ visitors** a month

214%

increase in traffic from Asia, noticeably India and China

47%

increase in traffic from Europe in the last year

Advertise in:

mrs.org.uk/directory

Contact:

 rbg@mrs.org.uk

 +44 (0)20 7566 1853

