impact

ISSUE 29 APRIL 2020

Using evidence & insight to make a difference

Mindful data

Automation allows data collection at scale but it's human interpretation that gives it the meaning

MRS

MRS Evidence Matters™

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All change

There have been many times over the past six years I've been editing this magazine when my column has centred on the topic of change. I wrote my first *Impact* editorial for the July 2014 issue, in what now seems like a much less tumultuous era. The report was about trackers and their business value, with the only foreshadowing I can detect being a reference to "those making business decisions must trust the data".

At *Impact,* our writers have worked hard to stay in touch with – and keep one step ahead of – the most critical issues.

In October 2014, we wrote about sustainability as we interviewed Unilever's then chief marketing officer Keith Weed, discussing – among other things – the company's Sustainable Living Plan. Jump to the present day, and last month's annual MRS Impact conference, where Extinction Rebellion's Paddy Loughman cited the FMCG giant as an example of a business that was seeing the returns from investing in a sustainable future; over the eight years of this strategy, it has had topline growth and a 290% shareholder return.

In those intervening years, we've had three General Elections – in 2015, 2017 and 2019 – and two referendums, with the question of Scotland's independence being asked in 2014 and the EU 'leave or remain' epoch-changer in 2016. And since 2016, Brexit was pretty much the only story in town... at least until very recently.

In July 2016, as the EU referendum was being held, I wrote – under the headline Survive Change – about disruption and its "powerful, uncomfortable, chaotic and challenging" nature. It was predominantly looking at the changes to business, but those words are certainly resonating now, through all aspects of life.

The past six years have seen us tread a winding path, navigating post-truths and fake news; embracing innovation, diversity and inclusion; welcoming #MeToo and #MRSPride. We've gone from bypassing experts, to listening attentively to what the scientists have to say; and pondered AI, data and the privacy and ethics associated with both. The social media hubbub goes on regardless, and we're witnessing the full horror these platforms can create with disinformation, as well as, possibly, being more grateful than ever for the virtual communities that can be created.

And so it is, that at this time of change beyond anything most of us have previously witnessed, I am making a change of my own, as I step down from this role. I'm very proud of *Impact* and have loved editing it; I really hope you all enjoy reading it as much as we enjoy putting it together. I'm delighted to be handing over the reins to the brilliant Katie McQuater.

So, as we all hunker down in this strange new world, and try to stay healthy and safe, I leave you with these thoughts. This industry is changing, and will probably change much more in the coming months, but its essence has never been more important: to gain insight and understanding from data to help make evidence-based decisions. Stay safe.

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When individual persuasion leads to social contagion

The argument for banning smoking in public places was largely won on the basis of 'passive smoking'. Once it had been shown that smoking was harmful to non-smokers, a convincing case could be made for a ban in the interests of protecting the innocent bystander.

Yet, the scientific evidence was far from watertight. Many studies had shown no link between exposure to second-hand smoke and ill health; indeed, more frustratingly for health campaigners, some even suggested that a non-smoker was slightly better off living with a smoker than in a smoke-free household. Although counterintuitive, this finding is not impossible – there are quite a few areas of human health where mild exposure to toxins is better than none at all.

Bluntly, the smoking ban was justified on the back of some rather dodgy statistical science – more 'policy-based evidence-making' than 'evidence-based policy-making'. A few scientists dissented. Interviewed on Radio 4 late in life, Sir Richard Doll, who was among the first group of scientists to establish a link between smoking and lung cancer in 1950, pronounced himself completely unconcerned by the presence of smokers.

And yet, the smoking ban has proved to be a huge success.

The smoking ban is an example of a right thing done for the wrong reason. Writing in his latest book *Under the Influence*, Professor Robert Frank, a friend and one of my behavioural heroes, has proposed a much more robust justification for the smoking ban – and a far better explanation for why it worked so well. The act of smoking encourages other people in your peer group to smoke. Hence, driving smoking out of mainstream social life removed the copycat instinct that made starting smoking easier and quitting harder.

As Frank convincingly points out, the harm that arises when you allow people to smoke freely in public arises far more from social contagion than from chemical exposure. The visible presence of any smoker in a group of friends hugely increased the odds that others in the group would take up smoking, or that smokers would fail to quit.

Even after correcting for the natural tendency of people who share a vice to cluster together, research cited by Frank shows that, in a group of five people where one smokes, if one additional person takes up smoking in that group, it will increase the likely number of smokers (or non-quitters) in the group by two. And this ignores any effects the new smoker may have on people outside the group.

But, even though it is scientifically far more convincing, we probably would not have accepted the argument as sufficient to justify a ban. It strikes at our deep-felt belief in individual agency. The unshakeable notion that we are – and should be – the exclusive authors of our own behaviour. I'm as guilty of this delusion as anyone; I worked with Mark Earls when he was writing *Herd*, yet it took me some years to realise that he was fundamentally right.

Yet, most large-scale changes in attitude and behaviour have perhaps succeeded more as the product of social contagion than individual persuasion. The widespread acceptance of same-sex marriage. The decline in drink-driving. The rapid decline in overt racial prejudice. Not dropping litter. Wearing denim. All have come about more through the wider social force of imitation than individual agency.

Yet, it remains the force that dare not speak its name. Economics is based on the idea of methodological individualism. This means that, when we measure the effect of legislation or incentives, we only look for the initial effect on individual behaviour – not the magnified social effect that comes later.

"Conventional approaches to measuring advertising may cause us to do it least where it is needed most"

This may cause us to hugely underrate the value of marketing – and to misdirect it. It seems entirely plausible to me that, when I buy an electric car in April, it will cause two other people to buy one (frankly, I'm only getting one because my brother has one). Likewise, if I were to install solar panels, my action may be three times more effective at cutting CO_2 emissions than I think, because it encourages my neighbours to do the same.

Yet, in the very early stages, advertising for solar panels might appear to be very ineffective, precisely because they are rare, and seeding an unusual behaviour is hard. But that is precisely when mass advertising may work best. Later, when solar panels become more commonplace, and that sigmoid adoption curve starts bending steeply upwards, my advertising will look extraordinarily effective, when much of the heavy lifting is being done by social imitation instead.

If this is so, conventional approaches to measuring advertising may cause us to do it least where it is needed most. And vice versa.

"We wanted to look at the **impact of elections on countries** and we were interested in the question of **'if you participate in a good election, do you become more democratic?'**"

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Chatbot research has found that South Africans are most likely to eat chocolate on a Thursday

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A programme giving women in Uganda, Rwanda and Ghana €8 a week for 100 weeks is helping families to have a better future

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"Homesteads have **survived and flourished in America** on the basis that they can rely on family. Where they would have **typically recruited family members,** farms are now becoming **dependent on hiring skilled labourers**"

(p12)

In 1990, small and medium-sized farms accounted for almost half of all agricultural production in the US and, today, it is less than a quarter

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Fair vote share?

Work to understand electoral manipulation and vote rigging in African democracies was awarded the 2019 MRS President's Medal and is helping to inform interventions and direct resources to areas most in need. By Katie McQuater

In December 2007, Kenyans went to the polls for their presidential election. The opposition leader had been expected to win – he was placed ahead of the incumbent president in every opinion poll bar one – but the ruling party was declared the winner.

The disputed result partly triggered a wave of post-election violence that led to the deaths of more than 1,000 people. Political scientist Professor Nic Cheeseman was in Kenya at the time.

"Being there and seeing the hopes of the election and the destruction after the election, and what it did to the country, made me realise the power and transformative potential of elections, but also the risk if they go wrong," he says.

Since then, Cheeseman has been working on elections, researching how they can be manipulated by governments to retain power, and how democracies can be strengthened.

In his latest project – alongside colleagues Gabrielle Lynch, Justin Willis and Susan Dodsworth – focusing on Kenya, Uganda and Ghana, the research has concentrated not just on understanding the factors behind

elections leading to violence, but also on exploring what can be done to prevent violent outcomes. The team is working with both international and African actors to try to anticipate better where elections may go wrong, and develop contingency plans.

"We wanted to look at the impact of elections on countries, and we were interested in the question of 'if you participate in a good election, do you become more democratic – do you become a more positive, democratic citizen?' If you see an election become rigged, do you become more pessimistic, less democratic?"

Uganda has never had a transfer of power, Kenya has had one and Ghana has had many, so the researchers felt these countries would give interesting variations on whether or not citizens had a good experience and how that had affected their views.

This involved nationally representative surveys of 8,500 respondents across the three countries, asking questions about whether participants had seen any election abuse or violence at the last election, and gauging people's attitudes towards manipulation techniques such as ballot box stuffing or vote buying – because "leaders are more likely to do things that they think they can get away with, with their own populations," says Cheeseman.

"Often, people don't see certain things that international standards might think of as being illegitimate," he explains. "The handout of money might be seen as illegitimate outside a polling station in the US. In some cases in Africa, it might be seen as a transaction – if it's buying a vote it might be seen as illegitimate, but if it's for somebody to buy medicine for their child that they might not otherwise get, it might be interpreted as evidence that this person is a good community leader, therefore boosting their chances in the election itself."

In addition to the quantitative studies, the team also conducted interviews with senior political leaders, journalists, civil society leaders and citizens across Kenya, Uganda, Ghana and several other African countries, as well as in Brazil, Russia, Ukraine and Armenia.

Safeguarding democracy

Cheeseman also developed the deep election monitoring model ahead of the 2013 election in Kenya, which brought together a range of Kenyan and international researchers, including political scientists and anthropologists. The impetus for this was that election observers are "not in the country for that long", Cheeseman says, "and one of the things we need to do is bring real expertise to the international community and to Kenyan organisations themselves".

This model allows that group of people to track issues across the election and provide a series of reports and briefings, including to the UK High Commissioner to Kenya and the Department for International Development (DFID), to help understand the political context better, inform policy, and ultimately make interventions and spend money more effectively.

The briefings focused on 'what was happening in the election and what we thought was likely to happen' and answering the questions: 'If it's going to go wrong, where's it going to go wrong? What can be done about it, what are the practical steps?'

The team, including Karuti Kanyinga, research professor of development studies at the University of Nairobi's Institute for Development Studies (IDS), and Mutuma Ruteere, director of the Centre for Human Rights and Policy Studies, could demonstrate that the major fault lines and areas that could see violence and problems in the 2017 election would be different to the hotspots of the 2013 election because of the changing nature of the parties and coalitions, according to Cheeseman.

"We were able to help people really focus their time and energy and efforts on areas where there were more likely to be problems... Geographically, if we're going to try to prevent conflict by investing in peace building, where do we invest? Areas that might previously have been hotspots might actually turn out to be safe areas."

Additionally, being able to pinpoint areas of the electoral system that might be most likely to break down – and how that had changed across the elections – helped to focus priorities in order to attempt to prevent the potential breakdown from happening. "It's not that we know everything, and we go in and the policymakers don't – it's that we were collaborating to help them see something they didn't see, but also to become more confident about things that maybe they had always had a judgement about but hadn't felt completely confident to do because they needed a robustness check or another opinion."

The voting risk reports have also shaped the plans of the Westminster Foundation for Democracy, a UK body that aims to promote democracy abroad, helping the organisation to manage risk and plan interventions.

"We developed a framework through which they could think about how they supported legislatures and parties, which approaches would be most risky, and which would be the safer ones," says Cheeseman. The organisation then built that into the way it planned research, and can use it to narrow down a big set of potential interventions and establish those ones in which to invest.

Cheeseman, Lynch, Willis and Dodsworth were awarded the President's Medal at the 2019 MRS Awards for their research on election rigging and manipulation strategies

Handing over the reins

With an ageing population and grain prices uncertain, US farms face a recruitment crisis, relying on retirees and volunteers. Bamm's Peter Lane **reports from the midwest**

"The intern's going to get the farm. She just doesn't know it yet."

I'm speaking to Kyle, a Vietnam 'vet' turned Texan rancher, at his homestead, Falster Farm in Winnsboro, Texas. We've been talking for about an hour. The conversation is sporadically interrupted by his radio chatter with the 'intern', Elizabeth:

"The bull's gone got loose."

"It's already been sold."

"I'll look in the backfield."

Over the course of the day, the search unfolds. I feel like I'm in an episode of *The Archers*.

I'm travelling across the midwest of America conducting ethnographies of agribusinesses on behalf of multinational oil company Shell. On every farm I visit, there is one prevalent theme.

Agriculture in America faces a recruitment crisis. In a country best known for its two coastal cities, you could be forgiven for not knowing that two-fifths of America is farmland. It is the largest mass of fertile, tillable land on the planet, and it divides into millions of holdings, farms and ranches, 95% of which are family-run homesteads that have passed down across multiple generations. But the current generation of farmers is an ageing

one, and as retirement nears, so does the question of who can help run and, ultimately, inherit the farm.

Farms that have previously been passed down from father to son have no obvious successor. The volatility of the sale price of the grains market, the anti-social hours and isolation, combined with two once-in-a-generation crop failures in the past decade, make the precarity of being a farmer unattractive to the future generation.

Homesteads have survived and flourished in America on the basis that they can rely on family. Where they would have typically recruited family members, farms are now becoming dependent on hiring skilled labourers, such as teams of combine harvester drivers – known as cutters. Cutters are an agri-industry of their own – they are aware of farmers' dependence on them and drive a high charge, eating into farmers' slim and fragile profit margins.

- Between September 2018 and September 2019, there were 580 Chapter 12 farm bankruptcies in the US – a type of bankruptcy only available to family farmers and family fishermen – up 24% from the previous year and the highest level since 676 filings in 2011.
- In 1990, small and medium-sized farms accounted for almost half of all agricultural production in the US, and today it is less than a quarter.
- China stopped buying US agriculture products in 2019 as part of a trade war with the US that lasted almost two years, until a new trade deal was agreed in January 2020.

In recent years, a solution to this problem has come from an unexpected source. Farms across the upper midwest have made use of the retiree and semi-retired population.

Clint, who manages the 2,500-acre Billings farm with his father, explains that the retirees are the ideal workforce: content with seasonal work, experienced and, vitally, people he could trust with his two most valuable assets – his machinery and crops.

Statistics from the Bureau of Labor confirm that this isn't an isolated case. Over the past decade, the average age of hired farm labourers has risen steadily, from 35.8 years in 2006 to 38.8 years in 2017.

Other farms have reached more novel solutions for attracting a workforce. In Texas, a high-intensity blueberry farm has adopted a pick-your-own model as the easiest way to bypass a labour shortage.

Kyle from Falster Farm has sourced his workforce from further afield. Over the course of the year, he generally has six or seven volunteers – 'interns' in his own words – that work on his farm.

He reaches these volunteers via the WWOOFing network (World Wide Organisation of Organic Farmers) whose aim is to pass on organic farming techniques – only Kyle intends to take it one step further and pass on the farm, too.

The farm's survival depends on Kyle finding the right successor. The quality of its produce and the trade relationships are the result of his specialist knowledge.

Kyle attributes part of his success to the unique calendar he follows. The chicks are all hatched by the moon cycle, while the schedule of sowing and harvesting follows the Roman calendar, so that he knows it is 234 days after the first full moon after equinox that the fields will be ready.

It sounds far-fetched and is hard to level with hardened Texan rancher Kyle. But his eggs have been shown to contain 500-times more vitamin A than industry benchmarks set by Walmart. And, as long as he can find it, the sale price for his lost bull is $7,000. The primary buyers of his produce are high-end restaurants in Austin, Houston and San Antonio.

As with many small-to-medium-size businesses, the relationship between supplier and buyer is personal, and depends as much on Kyle's laid-back style as they do on the product. Without a successor in place to nurture and continue these relationships, it's hard to imagine how they would continue to exist.

Often, and increasingly so, the solution for farmers is to sell up. Land and machinery can be sold as a package to the growing number of corporate farms. As 'big-ag' continues to consolidate the farm diversity, the total quantity of farms fell by 4% between 2007 and 2014, while the total amount of farmland stayed consistent.

Jeff, who runs a small soybean farm in North Dakota, has been repeatedly approached to sell the land to a soybean conglomerate but, as a young household, inheritance isn't (yet) a pressing concern. However, for Kyle, in his late 70s and a farmer of five decades, there is no issue more pressing to him than handing over the reins.

Peter Lane is research manager at Bamm

100 weeks to change

One organisation is helping women in Africa escape poverty, working with survey software firm Nebu to track progress.
By Malgorzata Mleczko

Do all household members own at least one pair of shoes? How often do you or any member of the household go without enough food to eat? Do you have access to clean water? How often have you lost a lot of sleep because of worries? Considering everything happening in your life, do you feel happy and capable of facing your problems? These are some of the many questions being asked regularly to women in rural areas of Uganda, Rwanda and Ghana taking part in the 100Weeks project.

100Weeks is a Dutch non-profit organisation supporting African women on their way out of extreme poverty. Operating under the tagline 'temporary cash for permanent change', 100Weeks provides women with €8 weekly 'mobile money' cash transfers via phones for 100 weeks.

Instead of offering food or supplies, 100Weeks offers unconditional financial support, along with some basic training in financial literacy and entrepreneurial skills. With that approach, women stabilise and improve their living conditions, and when those improve, they can work on creating a way to support the wellbeing of their families.

According to the 'theory of change' developed by the organisation, provided the women are given a chance to overcome the initial hurdle, they know what to do to stay out of poverty after the project is over. For example, they set up small businesses, create fabrics, grow crops, or buy a sewing machine to repair clothes.

Since 2017, 100Weeks has used Nebu Data Suite to collect, manage and use its project data. At that time, the programme was just about to scale up – to be launched in three African countries and to include more than 20 groups of 20 women each. With that growth arose the need for a comprehensive and flexible evaluation and monitoring system.

100Weeks' theory consists of three main steps that are continuously monitored: covering basic needs; assets investment; and empowerment.

According to the theory, the first thing that happens once women get financial support is that they start eating more, secure their most basic needs, and the general health of family members improves. In this initial phase, they often send children to school, as they have money to pay school fees and buy books.

After they have covered basic needs, the theory says that women start to invest in assets. They begin to look for a way to generate more money, repair their houses, buy livestock, create small businesses, and produce goods to be sold. Finally, the women feel more secure and stable about their situation and livelihood. They are ready for the future and, after the 100 weeks of financial support end, they are out of poverty and they stay out of poverty.

To test the theory, 100Weeks set up evaluation and monitoring using Nebu Data Suite, giving researchers information on how women are doing over time.

The core of the system is one single multilingual baseline questionnaire. When a woman starts the programme, she completes the survey before receiving the first instalment. The interview lasts around an hour and enables 100Weeks to get to know the women who are about to receive financial support.

Baseline interviews are conducted face-to-face by local fieldwork agents who visit the women in their own environment, and the questionnaire is available on tablets via the Nebu CAPI app, after being prepared at 100Weeks' Amsterdam office, with the results then available for the Dutch data team.

100Weeks has created tablet-based call centres that can pop up. Women are interviewed by local teams, usually every two months, for the duration of the project.

All data collected via CATI and CAPI,

including historical data, sits in Nebu Data Hub, an R-based data management platform, with processed data securely pushed via the Odata protocol to Tableau and other applications.

The data gives insights into the women's path out of poverty, showing the changes in their lives over time. For example, at the start of the 100Weeks programme, the women participating in Rwanda ate on average only 1.6 meals a day. This immediately improved after the money transfers started – after two months, the average number of meals increased to 2.5 a day.

Data also found that stress levels decreased. In Ghana, the percentage of women that often lose sleep because of worries decreased from 46% at baseline to 7% after half a year of being in the programme.

These improvements also result in the growth of businesses. Women invest in assets and livestock, and the average amount of cattle per family triples during the 100 weeks of the programme.

One group showed a strong decrease in the amount of livestock, and using Tableau, the researchers were able to disaggregate the data to see that the women were investing in more expensive livestock such as cows rather than smaller, cheaper animals (such as chickens), leading to a decrease in the total number of livestock. When such unexpected observations cannot be explained by the data, the 100Weeks team can liaise with local field teams.

The programme is successfully helping families to have a better future and lifestyle. With local coaches, 100Weeks supports more than 500 families – around 2,500 people – and has secured funding for another 500 women to build a better life.

Malgorzata Mleczko is head of marketing and CSR programme manager at Nebu

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Four steps out of poverty

The 100Weeks method is based on the Graduation Approach developed by international development organisation BRAC.

1 Overcome scarcity
People living in extreme poverty are often stuck in a survival mindset, and once their basic needs are met, they can focus on the future.

2 Invest in a better future
When no longer in the survival mindset, participants shift their focus – most women invest in a new small business, expand an existing one, or buy land and livestock.

3 Increase human capital
Women receive training in entrepreneurship, financial literacy, and life skills in peer groups.

4 Move out of poverty
During the two years of the programme, the women develop sustainable livelihoods, and when it ends, most have moved out of poverty.

Decoding cravings

Food retailers are under more pressure to compete than ever before – their rivals are no longer simply other retailers and grocers, but also new players and gig economy companies such as Uber Eats.

South African retail company Woolworths wanted to understand what is driving people's new food preferences so that it could develop new products, change the format of its stores and promotions, and approach price from a new perspective.

South African retailer Woolworths wanted to know what South Africans are eating – and why – and turned to a chatbot for answers.
By Katie McQuater

"We needed to have a deeper understanding of how South Africans engage with food," said Charlene Van Zyl, head of customer at the company.

Approaching the research using methods reported after the fact, such as traditional food diaries, wouldn't have been effective, as engagement tends to fall off when customers no longer enjoy completing them, said Van Zyl, speaking at the recent IIeX Europe conference in Amsterdam. Additionally, the brand wanted to dig deeper into people's motivations around eating.

Woolworths worked with Kantar to develop an approach aimed at understanding more about why consumers make the food decisions they do, and the reasons for those decisions across different categories and occasions.

Kantar designed a seven-day research study using an artificial intelligence chatbot diary, with the objective of collecting detailed information about what food people eat, and why. After recruiting participants through Facebook ad targeting, people shared their contributions through a chat conversation with an AI chatbot called 'Serena'.

The chatbot was designed as female to reflect the brand's customer base, 70% of which is female, and its scripts and questions were designed to reflect an outgoing 'persona', using first-person language.

'Serena' functioned as a coach, prompting participants to share photos and updates on their meals and snacks every three hours, then asking questions about whether there were any specific reasons why they had chosen that particular meal or snack aside from hunger, and the benefits over something else.

Karlien Kriegler, research director at Kantar, said: "We spoke to 1,100 people in total. The diary, focused on gathering habitual data in terms of when, what, how and where respondents were eating – and also provided meal preferences, as well as motivations of individuals over time. This enabled us look at rich behavioural patterns by hour, day, week and month."

Gamification was used to incentivise participants, who were issued with a R50 (around £2.50) gift voucher daily, with an additional reward if they completed the full seven days.

"People enjoyed talking to Serena, and the high engagement achieved allowed us to collect a very large data set. This contained detailed responses, providing significant insights on meals consumed, combined with precise motivations for choosing those meals," said Kriegler.

New weekly waves of respondents submitted diary entries over one month. With more than 1,100 participants sharing information with the bot, there were more than 10,000 meal occasion conversations during the fieldwork, with three data points per occasion – when, what and why.

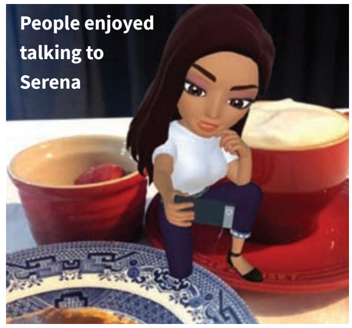
Kantar used artificial intelligence to process this large volume of data, and natural language processing to analyse the ingredients mentioned by participants into a list of more than 800; human researchers reduced this to 600. Additionally, the reasons people gave for eating particular meals were thematically coded.

Healthy eating emerged as a key motivation, with indulgence and cravings also featuring heavily. Throughout the process, researchers were able to pinpoint the ingredients related to indulgence – for example, chocolate, fruit and yoghurt – and map the motivation of indulgence and how it changed depending on the time of week or month.

According to the findings, participants were most likely to eat chocolate on a Thursday, when cravings for indulgent foods is climbing at the expense of healthier motivations. Chocolate and cinnamon also emerged as a popular choice for consumers.

The data also helped Woolworths understand trends from its transactional data. Previously, many of its promotions focused on treats and indulgence were carried out early in the week, but the research showed that people were in more of a healthy mindset at that point. In contrast, there was a lack of engagement with promotions for salad or healthy options pushed out on Fridays.

"The insights are broad and strategic, as well as practical and specific, and will be used in multiple areas of the business," said Kriegler. "With the data collected by Serena, we will be able to inform marketing, pricing, product development and trade teams. There are significant applications from this one rich data set."



People enjoyed talking to Serena

The impact of time of week and month on food choices

Monday, mid-month
Cravings are very low and healthy eating is very important.

Thursday, mid-month
Craving climbs steadily throughout the week, and indulgence increases, with healthy eating becoming less important.

Saturday, end of month/after pay-day
Craving at its highest level.

Understanding and surviving the next decade's challenges

Over the two days of Impact 2020: The New Agenda, speakers shared their research, predictions and projections about what we'll face over the next 10 years and more. Jane Bainbridge**,** Katie McQuater **and** Catherine Turner **report**

The need for sex-disaggregated data

Diversity is essential for research, as biased data has serious implications for how resources are allocated and products and services are designed, said Caroline Criado-Perez.

Discussing the research she did for her book *Invisible Women: Exposing Data Bias in a World Designed for Men*, Criado-Perez highlighted how data does not reflect women's experiences, and called on those collecting data to ensure it is sex-disaggregated – that is, specific to women.

Data reflects those who collect it; she doesn't think describing data as 'the new oil' is helpful. "It presents data as this tangible substance with inherent properties that exist in the ether ready for us to extract, but data is more than just numbers – data is us and we are data."

She shared two examples of data sources that had not sex-disaggregated the data: labour force statistics, which historically undercount women in paid employment; and public transport data. "The data was skewed to the detriment of women, and this is not a coincidence – most datasets share this. The vast amount of data we collect has been collected on men. Pretty much everything you encounter in the world – the offices we work in, public transport, medical treatment, the phones we use and the apps on them – have been designed to work for, so don't work that well for women."

This is "not a conspiracy", argued Criado-Perez, but "the result of a way of thinking we all share". When women take part in the data collection process, evidence shows the data is less biased. "The research that is produced is more likely to have sex-disaggregated data collection," said Criado-Perez. "That doesn't mean it's perfect, but they're less likely to forget that women exist than men."

She also flagged research on how people tend to perceive gender-neutral terms – including words such as participant, user and researcher – as male, regardless of our gender.

Criado-Perez talked about Apple's health tracking app that couldn't track periods. "It's not credible to me that Apple deliberately set out to exclude women – it just forgot periods happen, because it didn't have enough people who have periods on its design team," she said.

Criado-Perez said she was "furious and upset" when writing the book. "I was terrified I wouldn't be listened to."

The future of Europe

Coronavirus may prove to be a "political gift" to the government as it could paper over the "slow puncture" of a Brexit-fuelled economic slowdown in the eyes of the electorate, according to political scientist Professor Anand Menon.

He said that the slowdown was "like a slow puncture on your bike – it takes ages to realise it, and you don't know where you picked it up.

"That's what the government is partly counting on, and in this sense at least Covid-19 is a gift to the government, as I suspect it would be successful in spinning this line. I don't think a Labour government would be able to puncture that narrative."

The director of independent research firm The UK in a Changing Europe said Brexit negotiations would prove "very, very messy for services".

He thought it almost certain that, should the UK and EU strike a deal before the end of the transition period, there would be nothing on services. "For all they say that the [current rules around] services are not complete, it's a damn sight more complete than agreements anywhere else in the world."

His talk – 'What we know (and don't) about the future of Europe' – covered the ironies and paradoxes on both sides of the English Channel as negotiations kick off, with political rhetoric rarely matching the economic realities. Issues over fishing rights and Gibraltar would over-index as politicians looked for populist policies with which to placate their electorates.

"It's the only trade negotiation in history whose sole purpose is to make trade more difficult," Menon added.

The Tories faced a dichotomy over voters in their new 'blue wall' wanting extra funding for their regions and extra taxation for the rich, in contrast to traditional conservative values. The recent Budget was a clear indication of how it intended to woo those areas with fresh investment, despite the fact that "the kind of Brexit this government is pursuing will disproportionately hit the areas it is apparently trying to help".

Labour's biggest challenge to becoming an election-winning machine was schisms within the party, "still tearing itself apart on values," he said. Any new leader would struggle to bring the factions together: instead, he recommended "relaunching the party and clearing the stables out".

Towards inclusive market research

Our industry is too white, middle-aged and straight, said Ali Camps, deputy chairman of Quadrangle, as she opened the panel discussion on inclusion.

"We have a majority of women working in data and insight but the balance tips the other way in senior leadership," said Camps.

Her initial challenge to the panel was: is this focus on inclusion just a fad?

Dr Marie-Claude Gervais, co-founder and research director, Versiti, said: "In terms of gender diversity, more people are self-identifying as LGBTQ+ so it's an empirical fact that we're more diverse."

Melissa Gonsalves, director of strategic insight, Differentology, said: "The biggest impact is technology and having a voice. Every one of us can speak up – we can't be silenced anymore, good or bad. It's not a fad."

But there has not been enough serious action to instigate change, argued Kenny Imafidon, managing director and co-founder, ClearView Research. "Look up – look at the boards and investors. Until they take it seriously, it won't change. It's seen as strategy rather than crucial to the business. If you look up it's male, pale and stale."

Ella Fryer-Smith, freelance research consultant, was concerned with the lack of social inclusion. "Social inclusion is the last taboo subject; we talk proactively about things but not class and intersectionality of income. It's uncomfortable; not many people in the industry are from lower classes."

Camps questioned if we need to think about the difference between inclusion and representation. "Are we at risk of misrepresenting diverse voices because we're mostly white and educated?"

Gonsalves said: "Representation is paramount, no matter what the industry. Unless they can see, they won't aspire. Representation is important for aspiration but has to start at the ground level."

Is positive discrimination needed? Gervais said: "We need quotas but education around it so it doesn't backfire. And it's positive action not positive discrimination."

For Imafidon, how those within the industry can help others is crucial. He said having good mentors has given him the confidence to do the job and grow his team. Gervais added: "The more diverse a team, the better the quality of decision making. Teams that are diverse think they make worse decisions because the process of getting to the decision is harder."

The promise in the peril

The market research industry should position itself at the vanguard of climate change action, according to Extinction Rebellion's Paddy Loughman.

He believes that market researchers are in a prime place to listen to consumers' changing expectations and behaviours, forecast the trends ahead and nudge businesses into decisions that are better for them, better for consumers and better for the planet.

Loughman, also a freelance strategy director and marketer researcher, said: "It is very important for this industry to know that climate emergency is not a story. It is a setting within which all stories take place; if we're not talking about this and helping our clients understand what to do then we are sending them in the wrong direction."

In a wide-ranging talk, he also touched on the "conservative mainstream" science that shows we are on the cusp of catastrophic climate change – but that we should be optimistic about the future.

Waking up was hard to do, said Loughman, pointing to factors such as status quo bias, consumer fantasy, optimism bias, hyperbolic discounting and the backfire effect.

"It's a choice between two kinds of change: climate and system. There is so much promise in the system change – when we understand that we can do this it becomes an easy decision to make. Extinction Rebellion is here to draw attention to denial and to help overcome it," he said, comparing the group to an "annoying" fire alarm, for which we are grateful when the fire turns out to be real.

"What comes next is the fire brigade – and we are all that fire brigade. It is up to us to pick up the fire extinguishers and rebuild the house so that it doesn't catch fire again."

Part of the problem, and denial, comes from measuring the wrong things, he said. For instance, the UK makes much of its carbon emission targets and savings, but the country was outsourcing much of its production to China and India, while berating those same countries for increasing carbon emissions.

"We need to measure carbon consumption because if we're not measuring all of the consumption then we make the wrong assumptions about China and India. It's all of us or none of us."

For businesses, he urged them to see systematic change and sustainability as an opportunity not a sacrifice.

He cited Unilever's Sustainable Living Plan, which over eight years saw topline growth and a 290% shareholder return. "It takes just 20% of a sector to do something different for the whole sector to change."

Better systems, better truths

Technology has complicated, confusing implications for the future, so we need to create new systems fit for an online world, according to Jamie Bartlett, former director of the Centre for the Analysis of Social Media at Demos.

Based on a few assumptions – that the cost of creating, storing and sharing data, as well as analysing it, will continue to fall, and that "humans will remain as silly and as irrational as ever" – Bartlett expects a more complicated future than envisaged in *Minority Report*.

"It's the vision of Franz Kafka and Philip K Dick that I worry about for the future – a far more tedious, complicated, confusing world. It's our job to reduce the confusion and re-establish ground truths."

Microtargeting of voters offers one example of how systems designed for the offline world do not apply to the possibilities of technology – but there are other technologies that could have implications in future. For example, Bartlett suggested smart fridges could offer politicians data on voters' dietary profiles. "It sounds slightly ludicrous, but I don't think any of this sounds weirder than if in 1997 or 2001 someone had tried to explain to you that elections would be won and lost through a social media platform called Facebook – because that would have sounded like science fiction back then.

"For elections, we need to work out how this is going to work. What happens when everyone receives a different ad in their smart fridge based on 20 or 30 years of data? Can we still run elections in a way that is fair? We've created all these systems to reduce confusion and understand how things work, and they were all designed for an offline world but are being used in an online world."

There is also a need to establish new means of explaining technology to those who are not specialists, he said, citing the example of GDPR giving people the right to know what data on them companies hold. "No single person understands how all this tech works and it is getting more complicated. If you don't get a job because of a machine learning-based algorithm, you're going to need ways of finding out why that decision was made without being a coding expert."

Fostering wellbeing at work

Changing expectations of the workforce will force organisations to act on wellbeing and mental health, but more data is needed to truly effect change, according to a panel discussion with PwC, Mind, Respondi and Opinium Research.

Dane Krambergar, head of workplace wellbeing services at Mind, said the charity's work with university students has highlighted what new entrants expect.

"Young people are expecting more support from employers when they enter the workplace." However, what that support looks like varies from person to person.

Mental health is becoming a bigger topic of conversation for the industry, but research from Opinium found that 85% of respondents working in market research agreed they had struggled with their wellbeing in the past year.

Sophie Holland, senior research executive at Opinium, said: "One of the big things – particularly agency side – is managing workload; it's one of the top reasons people don't take time off work, as they've got too."

Market research can involve stressful situations, said Jenni Roberton, managing director of Respondi. "It can be a relatively solitary space in terms of writing proposals late at night, building presentation decks. Also, there is so much pressure in terms of cheaper, faster, better and clients wanting things within 24 or 48 hours."

PwC has conducted research on healthy team working, finding that there are nuances in the causes of stress. "Long hours alone doesn't automatically lead to stress, it is the nature of those long hours," said Rebecca Ormond, workplace leader at PwC. However, she added: "How much control do you have over it? Lots of us feel that we're in a project and we're flying and it's rewarding, but it's within our control to stop it. The challenge is when control is taken away. When you've got a team working together that can feel very different to someone working in isolation – people checking in makes an enormous difference."

Ormond stressed leadership is essential for good workplace wellbeing, adding that leaders should be held to account for supporting wellbeing in their teams.

With various initiatives being rolled out within organisations, more data on what works is also key, the panel said. "Traditional KPIs are things like sickness absence levels and retention, but increasingly we think people should be asked questions such as 'is your mental health better or not since six months ago'?" said Krambergar.

The future is a foreign country

Ipsos Mori's CEO Ben Page shared a whistle-stop tour of consumer trends with one eye to the future.

"Most predictions are wrong. The more we know that, the more comfortable we will be when something does happen," said Page as he shared insights from Ipsos Mori's global trends research. "Everyone – in every sector – is really bad at predictions, except for weather forecasting. Pollsters are good sometimes, but they have to get close to the event," he added.

Carried out among 22,614 16- to 74-year-olds across 33 countries in June and July 2019, the research findings covered most aspects of modern life.

Twelve key trends were identified: climate antagonism; conscientious health; authenticity is king; data dilemmas; the tech dimension; peak globalisation; a divided world; capitalism's turning point; reactions to uncertainty and inequality; the enduring appeal of nostalgia; search for simplicity and meaning; and choices over healthcare.

The five global values, measured by value intensity, were: climate emergency; trust in medicine; regulate big tech; aspiring to health; and fear of the future.

Fear of the future was clearly affecting various areas, with 45% thinking 'our children will be poorer than us'.

Other worries that came out in the data included that 47% think even scientists don't really know what they are talking about on environmental issues, and 77% think it's inevitable we'll lose same privacy with a rise in data apathy.

Page questioned whether we were reaching a turning point in capitalism, with 77% thinking wealthy people should pay more tax and 74% thinking the economy is rigged to advantage the rich and powerful.

How businesses fair in this is interesting. "People want businesses to speak up," said Page, with 78% saying you can make money and support a good cause at the same time.

Nostalgia is here to stay – 50% want the country to 'be the way it used to be'. But Page added: "We want the bit of the past that makes us feel comfortable."

And while coronavirus was touched on a few times in his talk, Page didn't dwell on it. However, he did say: "We're generally good about panicking about negative things."

He also pointed out that the businesses that do best in a crisis have good teams and trust each other.

Wrapping up his keynote, Page shared several points where there are contradictory trends in terms of consumer thinking:

- We have a climate emergency but there's no agreement on response
- There's data anxiety but also rising apathy
- A friction between local and global outlooks
- We are searching for simplicity and good health but also seeing a rise in hedonism
- We want authenticity and we're also increasingly sceptical.

The stories that need to be shared

It's important for authors to write beyond their own perspectives and demographics, Booker prize winner Bernardine Evaristo said.

Evaristo, who won the award in 2019 for her novel *Girl, Woman, Other*, said: "I feel very subversive as a writer – I write the stories I feel need to be out there, defying stereotypes and writing into the absences that have prevailed."

Evaristo said there is a need for more authors to write about cultures and perspectives that differ from their own. "We're all human, so you have to tap into basic human emotions – as writers, it's really important to engage with as broad a range of society as possible. One of the reasons black women aren't as represented [in literature] is that we're the only ones who write ourselves."

"There's this fear that we shouldn't step out of our comfort zone, but creating characters is always a challenge and it's really important to create beyond your own demographic," she continued. "But a lot of writers in this country are always writing from a very, very limited perspective – white, middle-class men, for example. You do have to write with sensitivity, and there may be consequences, but you need to deal with that."

Immersion in other countries, reading widely and archival material all play a role in Evaristo's research process. "When I'm researching a work of fiction, I'm looking at how I'm going to tell the story and the information I need to tell it an authentic way."

She has carried out field research in Nigeria and Brazil to "soak up the atmosphere, look at the buildings, the environment and listen to people's voices" and she interviewed her parents at length while researching her semi-autobiographical novel *Lara*.

"Most of us grow up and our parents won't tell us very much, but because I was interviewing them for background for the book, they were much more revealing. Those tapes are now archived at the British Library."

Research is just observation of human life, she said. "It's just osmosis, absorbing everyone you've ever met, listening and being alert to people and human behaviour and psychology, and also the stories you've heard – that's the research you get through the experience of living."

When asked what advice she would give her younger self, she said: "Do the work, trust the process and dream big. We're taught to underplay our achievements unless you're part of a particular demographic running this country. We need to develop our own sense of ambition."

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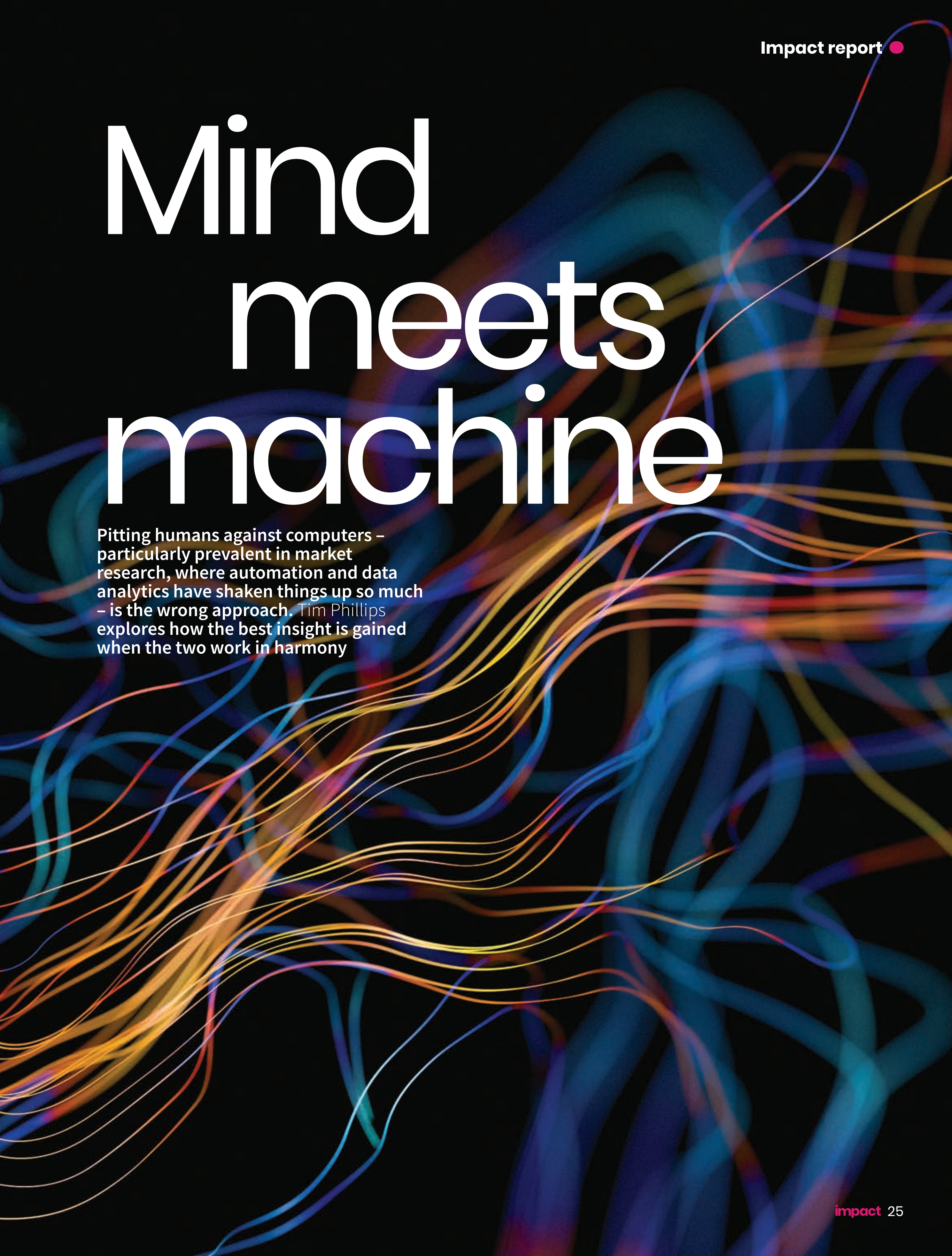


Mind meets machine

Pitting humans against computers – particularly prevalent in market research, where automation and data analytics have shaken things up so much – is the wrong approach. Tim Phillips **explores how the best insight is gained when the two work in harmony**

In 2008, Chris Anderson, editor-in-chief of *Wired*, and the populariser of the 'long tail' model of marketing that captured the imagination of a million start-ups, turned his attention to what he called the 'petabyte age'. This would represent, he wrote, "the end of theory".

"It calls for an entirely different approach, one that requires us to lose the tether of data as something that can be visualised in its totality. It forces us to view data mathematically first and establish a context for it later... Google's founding philosophy is that we don't know why this page is better than that one: if the statistics of incoming links say it is, that's good enough. No semantic or causal analysis is required," he argued.

Anderson's hypothesis was that models of the world, and therefore the people who create those models, would be redundant in the decision-making process if only we had enough data. It was a powerful argument in the early days of big data – politicians, policy-makers and marketers no longer needed to know why, because knowing was enough. "Forget taxonomy, ontology and psychology. Who knows why people do what they do? The point is they do it, and we can track and measure it with unprecedented fidelity. With enough data, the numbers speak for themselves."

Only, they didn't. In the decade since, market researchers discovered the limits of the petabyte age, sometimes by the costly misstep of throwing petabytes of data at a problem. Rather than ending theory, most attempts to remove the human from decision-making have pointed out exactly why we are still, in many cases, essential.

This isn't the first time that inflated expectations of technology have been cut down to size. In 1933, the Chicago World's Fair had confidently promised that "science finds, industry applies, man conforms", an apparently optimistic message about work at the time that, with hindsight, seems not just misguided, but a bit creepy. In the century since, we have consistently assumed that machines are replacements for the power of our minds. There is evidence in market research, however, that the most effective uses of technology are coming from innovators who understand that minds and machines are more effective when regarded as complements, rather than substitutes.

"The most effective uses of technology are coming from innovators who understand that minds and machines are complements rather than substitutes"

Part of the reason for this complementary approach is that we are no longer using technology to retool factories, but to nuance decision-making. Paul Twite, managing director, MENA, at Toluna, has seen at first hand the evolution from no need for automation, to a sudden rush to automate, to an accommodation of the two. Toluna innovated in automated quant research: "We launched QuickSurveys in 2007," Twite recalls. "And, to be honest, at that time no-one in the market cared because brand owners didn't need information back that quickly. Market research agencies could spend three months making a report and putting a bow on it, because manufacturing cycles were nine months long."

When the length of those cycles shrank dramatically, there was a sudden need for rapid responses, which Toluna could provide. "Automation removed a lot of time from processes. You didn't need to brief a corporate agency to brief an agency in the field to collect data that was entered into a computer and analysed, and we were ahead of the market." But automation had also outpaced good decisions in some

cases, because it fragmented decision-making and led to poor-quality questions that would never generate high-quality insight, no matter how quickly it arrived.

For some of Toluna's clients, multiple markets or business units would ask similar questions, but responses were not being shared, standardised or reflected on. Hypotheses were not systematically developed, evaluated or discarded. At its worst, the allure of the machine trapped organisations in tactics, rushing to the next decision, moving faster but often becoming less effective as decision-makers.

One of the ways in which Toluna is adding the human mind back into the process is by working with its clients to make its surveys more consistent and more impactful by using the advice of experienced researchers to analyse the whole of a client's activity. Twite says: "We were on a call with a client this morning, with its insight team, and our methodologist had been looking at the types of questions it was asking on our platforms. He was able to offer tips about how you could explore that data in a more interesting way, to start revealing better insights."

The promise of mind and machine working

The value of being human

Since the turn of the century, economists have been trying to quantify the decline in demand for routine work done by humans – what they refer to as the 'hollowing out' of the labour market. This term comes from the nature of change in employment – high-skill jobs cannot yet be automated, and low-skill jobs are done cheaply enough by humans to ensure that automation is not efficient; therefore, it is routine, mid-skill jobs that are being automated away.

Ironically, they have been able to measure this hollowing-out better through estimates provided by machine learning. The most recent contribution, by Nir Jaimovich, Henry Siu, Itay Saporta-Eksten and Yaniv Yedid-Levi, was published in February 2020 in a working paper titled *The Macroeconomics of Automation*. This focuses on the reduction in demand for routine work – such as, of course, coding surveys. It concludes that 'routine-type' individuals have experienced a fall of about 16% in the likelihood of working in routine occupations since the 1990s. Two-thirds of those workers have left the labour force, and the others have taken low-skilled jobs.

The definitive work on which jobs will remain human occupations was done in 2016 by Carl Benedikt Frey and Michael Osborne, at the University of Oxford. They used AI to rank 702 occupations in order of the probability that workers in them would be automated. For market researchers, the probability was well above average: 61%. The jobs in a sector that do not get automated, they concluded, are the ones that require creativity, empathy and negotiation skills, a pattern that is now playing out in the research industry.

empathetically, Twite adds, will also be to make the best of rapid hypothesis testing: to examine the data, consider a question of interest, but then use automation to put that into the field immediately. In the next iteration of Toluna's platform, clients can script questions and get response data back in real time – a process that, perversely, makes the human part of the research process more important.

The rush to automate

This swing from manual to fully automated, to a hybrid that recognises the shortcomings of each, has also taken place in qual. "There was a step change around the 2008 recession, when everyone had their budgets slashed," recalls Jem Fawcus, group CEO at Firefish. "All our clients wanted to do more with less, and decided that technology was going to solve all their problems."

The moment coincided with the apex of the big data hype cycle, and Firefish, like many agencies, found it was being pressured to replace minds with machines in its qual research. "At the time, it was presented as a binary, either/or thing. There were many technology providers with no background in research who were selling their services direct to the client. So we had to adapt pretty fast."

The promise of automated 'mass qual' – what Fawcus has termed 'Qual 2.0' – was alluring, but the results were often superficial.

"There was a change in the definition of what was 'good'… it used to mean the best quality you could get, the most actionable answer. Now, it often means what we can get in the time and for the budget that

Human-centred design

One of the most influential researchers and designers of the hi-tech revolution based his thinking on a profound belief that technology and our minds are complementary. Donald Norman, author of *The Design of Everyday Things*, and known as 'the father of user experience', has been vice-president of advanced technology at Apple, the founder of UX research pioneer the Nielsen Norman Group, and a professor at Harvard.

In 1997, he was already cautioning against tech fetishism that was making products harder for humans to use: "According to today's machine-centred point of view, humans would rate all the negative characteristics (vague, disorganised, distractible, emotional, illogical), while computers would earn all the positive ones (precise, orderly, undistractible, unemotional, logical). A complementary approach, however, would assign humans all the positive traits (creative, compliant, attentive to change, resourceful) and computers all the negative ones (dumb, rigid, insensitive to change, unimaginative)."

At the same time, Norman gave an early warning that the fad for technology at work was placing too much focus on numbers, and too little on understanding the information that was being generated.

In reporting, he advocated "eliminating or minimising the need for people to provide precise numerical information, so they are free to do higher-level evaluation, to state intentions, to make midcourse corrections, and to reformulate the problem".

will help me make a decision. And sometimes it just means generating a bit of stuff, rather than a really robust argument."

That 'bit of stuff' might mean a few video vox pops, for example, devoid of the context in which they were collected. Or huge amounts of information collected from online communities, but without any sense of how well those views represent the insights and opinions of community members.

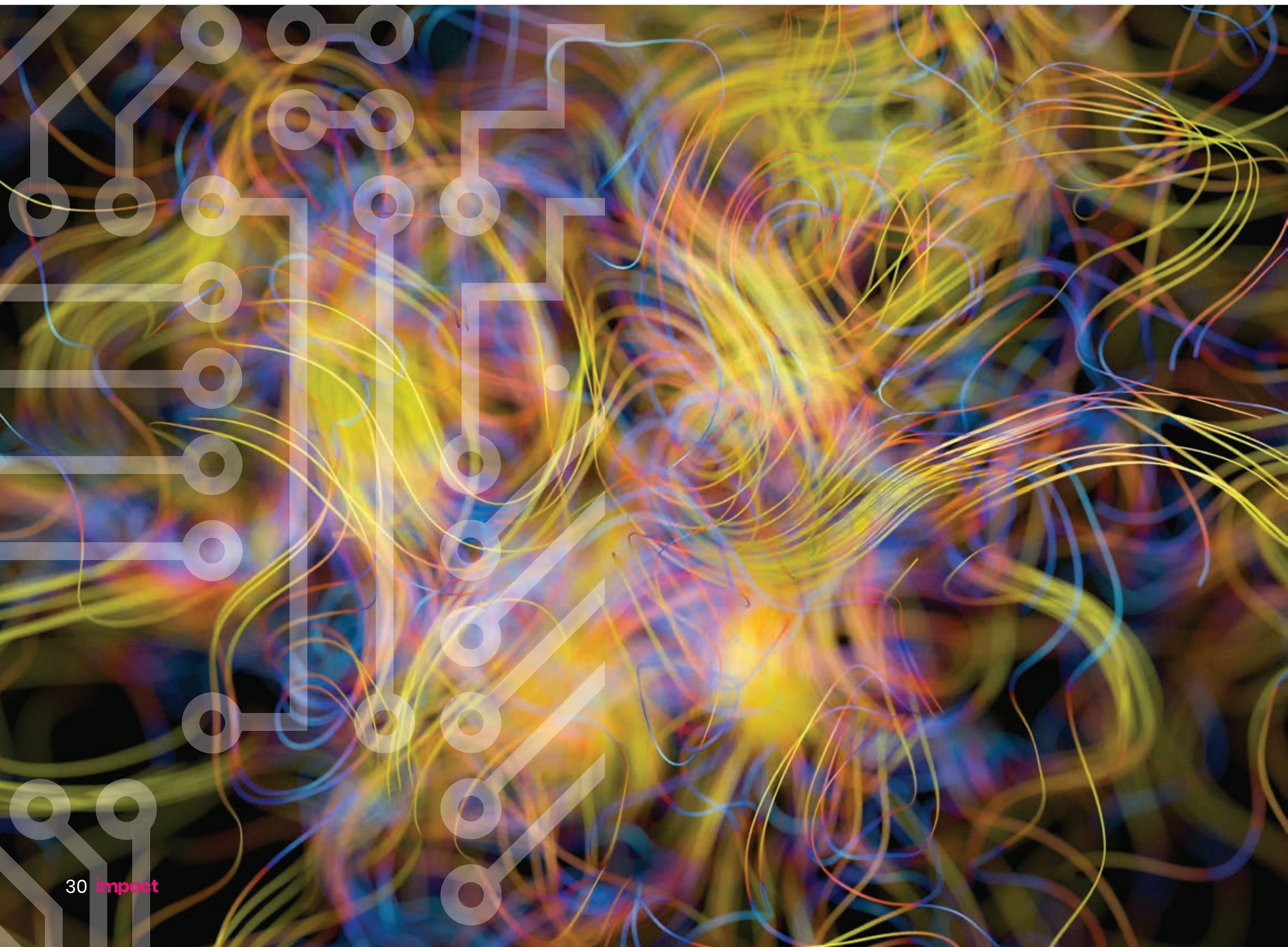
Fawcus argues that many clients have learned from experience that they can get lots of information very cheaply, but not necessarily make better decisions from it – but this doesn't mean rejecting all forms of automation. Nor does it mean that researchers should set themselves up as Luddites. One of their functions, he argues, is to use the baseline skills of moderation, or data analysis, or storytelling, to identify where technology can assist group moderation or a homemade video can make a telling point. The result is 'Qual 3.0', a synthesis of automation where it works best (for recruitment, for example), but shaped and directed by people.

"Counterintuitively, as AI improves, it has not lessened the reliance on human skill"

"The researcher now needs to be adept at bringing together different information and data sources, filtering out the signal from the noise, putting it into a context of human understanding, and producing a strategy. At its best, it is a valuable skill that is not matched by technology. Nor is it matched by other disciplines," Fawcus says.

Better together

At its most basic level, the combination of mind and machine can simply mean reallocating tasks where they are best done– a sort of basic optimisation of work. Alex Wheatley is director of digital and data



technical innovation for Stan (Social Text AI and Natural language), an AI toolkit offered by the Kantar Analytics practice, which melds the abilities of minds and machines to derive meaning from social text, images, maps and all types of contextual data. "We take large amounts of conversation and try to find the themes and semantic correlations by running it through natural language algorithms. At the moment, it is mostly used to pull out and review trends. A client might be deciding where to invest, for example," Wheatley explains.

While the automated part of Stan can spit out all sorts of correlations in the data, it can't attach meaning, sense or causation to those ideas, and that's where the minds take over. Some of the work involves catching errors that machines may make – for example, by conflating CBD, the cannabidiol, and a central business district, and finding an unusual trend as a result. But much of it involves triangulating results with qualitative, survey and panel data – what Wheatley calls a 'curation' process.

Counterintuitively, as AI improves, it has not lessened the reliance on human skill. Rather, just as the Industrial Revolution actually increased employment, converting skilled weavers into loom supervisors, AI is creating a richer set of ideas to curate. There are no plans to reduce the role of the minds in the process, Wheatley says. "As soon as we improve the output, there's another finer level of granularity that needs our team again to make sense of it."

With a company name of Digital Taxonomy, and a mission to use AI to code unstructured data, you would expect Tim Brandwood, CEO and co-founder, to enthusiastically minimise the role of the human in coding surveys. Not so.

"We're purposely keeping people in the process and allowing them to do more," he says.

Brandwood is a rare researcher-coder who also has experience at the sharp end of market research, having spent three years at Millward Brown. In 2015, Digital Taxonomy identified a lucrative "niche within a niche in market research", as he explains it, coding the responses to open-ended questions in surveys. With repetition and consistency important, and manual processes that had hardly changed since the introduction of the desktop computer, this process was often still taking weeks for researcher teams to perform, or sometimes not being done at all.

But, having experience in AI, Digital Taxonomy has never advocated removing the human from the coding process. "There's no point in paying a person to constantly categorise the phrase 'good service'. Get a machine to code that," Brandwood says.

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Telling a story

"We're all competing to get people to focus on the things that we think matter. Throwing more data at that problem is never going to convince people, so we need to be much smarter about the engagement process," says Caroline Florence, founder of Insight Narrator.

One way in which the mind can definitely complement machines is that researchers can find a narrative in data that helps the business act on insight – a skill with which the data-driven side of the business often struggles.

In 2012, Florence set up Insight Narrator to coach 'anyone who focuses on data' to creatively communicate the insights that data is providing. It's not just about making a better PowerPoint, she says: "It is the opportunity to inject a little bit of good thinking into the process without slowing it down."

The common problem among her clients is that many of them are in fast-paced or agile environments, and have little time (or confidence) to convey context and narrative that leads to action. For example, Florence recently spent three days working with 60 data specialists from the government of Jersey. One of them was responsible for reporting costs in the health service. "She gets consistently asked by politicians and lobby groups how much a hospital bed in Jersey costs," Florence says, "but she couldn't answer because the models underneath are so complicated."

The team eventually hit on the very human idea to mock up the price of the hospital bed as if it was an Airbnb room. In that way, the people who needed to know could intuitively understand the variation in price according to what was being delivered, without having to know the details of the data science behind those costs. It also made discussions about where to invest or how to cut costs possible, without misrepresenting or oversimplifying the data.

"Sometimes 'big data' is not the answer, it just creates more noise, and we need to be more sympathetic to the end audience – think about their expectations," Florence says.

"The machine can do as much as it can, but then you need human coders to come in."

The company has purposely downplayed the promise of technology, because Brandwood has witnessed fully automated coding applications that produce low-level insight from free text – a sentiment score, for example – but not the fresh information about the business that clients value. "What we can say is that the machine will double your speed by doing the 50% that it can do. But coding is nuanced, detailed and fine-grained – I want to free people from doing the grunt work, to spend the time doing the valuable work." Ultimately, he says, the value might

be from reversing the trend away from open-ended survey questions, which have often been abandoned precisely because they are not machine-readable.

The dog that doesn't bark

"Where AI and automation work well is in tasks that are repeatable, scalable and follow a common structure," says Paul Hudson, CEO of FlexMR. "The desire of everyone to get the most from their budget is understandable, but it can lead us into oversimplification – the desire to hit an 'analysis' button."

Hudson's three rules for adopting machines are well-founded in technology, but don't match well to what many of his clients want to discover – the insight that clients (and researchers) don't yet know exists, or the good things that respondents or community members are not saying, to listen for the metaphorical dog that didn't bark. Hudson has experimented with automating his qual research, notably by seeing how far he could push the use of moderator bots. But it has confirmed his insight that AI is rarely able to make sense of something on which it hasn't been trained. Therefore, new ideas, or missing ideas, would be extremely hard to spot using machines alone.

His research on research has shown that, for large chunks of customer service analytics, where the AI may be looking for a tick up or a tick down in a predetermined set of KPIs, and marginal change in other indicators that may drive them, automation is a huge benefit. "That's brilliant, it works really well. But apply this to any type of community data, such as a forum, and it doesn't work well because there are open-ended questions and moderation. It has a group dynamic and doesn't have a common structure. It isn't repeatable, and the scale is smaller, so there is less to train the algorithm on.

"AI does not have wisdom, it has learning. We concluded very early that there is a benefit to having both a mind and a machine involved."

"Where AI and automation work well is in tasks that are repeatable, scalable and follow a common structure"

Skim has taken this research-on-research method a step further, creating a project with its client Danone on how best to create insight. The experiment, which took place in 2017, led to a research paper called *(Wo)man vs. Machine: From Competition to Collaboration*. Its conclusion was that knowing when to think and when to automate has become a valuable skill for researchers.

"We were thinking about how we could speed up our qual research, make it cheaper, because many clients wanted to do qual with a limited time and budget," recalls Marcel Slavenburg, the head of methods and innovation for Europe at Skim, "so we knew there was some place for automation."

To find out where that place might be, Skim designed an experiment in which it would create three reports for Danone on its new product. The first would be entirely automated, the second would be done using traditional, human-only research, and the third would combine the two methods. The three teams would work in parallel, and the client would not know which methods had been used to generate the insights. The research output was generated by videos recorded using Voxpopme, and transcribed before analysis.

The result: a clear preference for the hybrid approach. "The human analysis took two weeks and was expensive, but had a lot of granularity," Slavenburg explains. "Combining automation with human insight took half the time and we could do it for half the budget. But the machines did not connect the dots. We found it was better to hypothesise, and use that hypothesis to dig into the data."

The advantage isn't just in generating hypotheses or saving money, he argues; it enables more agile ways of working, for which clients and agencies need to collaborate. Early passes at the data can reset the research agenda, create new iterations. And so, alongside the creativity and empathy of research, we have the third dimension that, in Carl Benedikt Frey's research, protects jobs from being automated – negotiation.

Research, meet operational data

"We see that there is a lot of data that can be reused. There are outputs of machines that people just aren't using," says Nick Baker, CEO of Savanta. In the agency's work with large clients such as Severn Trent Water, Savanta often discovers potential goldmines of insight that are outside the research framework.

One example is the digital experience analytics platform at Severn Trent that is employed to optimise the design of its online presence and analyse customer journeys in that context. Baker says: "We're always trying to reapply data within the survey architecture, and have more decisions informed by more data, more often. We're trying to get stuff in place so we can, theoretically, connect research to customer information, and when that ability is in place, you have something that's like a heartbeat monitor for the organisation." This not only provides real-time feedback on the company's health, but can help direct the research agenda when more traditional methodologies are required.

To make the most of this opportunity though, researchers will have to build bridges with the human face of the machine. Rather than keeping the analytics function at arm's length ("take this data away and show me something clever", as Baker puts it), it can be used to adapt traditional market research methods. An example is the data analyst's habit of iteratively adjusting the way the data is interrogated – asking different questions of it until it yields an insight – which is alien to a researcher's instincts. "Having more people involved with different skills and experience helps us," says Baker. "There aren't many research agencies with tech capabilities in them. It's either a massive miss or a massive potential for growth in the sector."

From new markets to long-term strategy, BT is positioning its insight team as partners to the business, with insight connecting to everything it does. By Katie McQuater

Ringing the changes

"You are one of one, but being connected breeds more fun, and more opportunities," opens the spoken word poet voicing the advert for BT Halo. The ad lists the numbers of connections we need in our lives, from e-sports to climate change marches, in order to highlight the benefits of BT's combined 4G, 5G and fibre broadband plan.

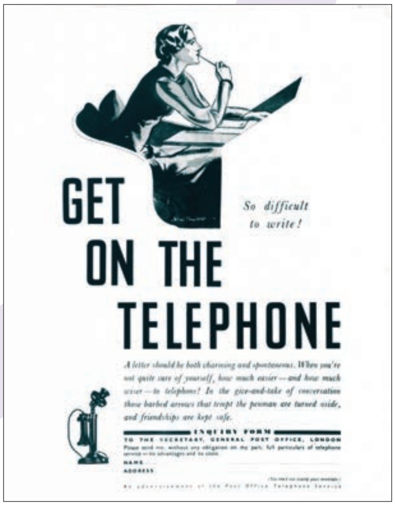
Connectivity is BT's core business, and it's at the heart of Georgina White's mission, too. As group insight director, she is leading a change in how insight is placed at the heart of decision-making at the company. Since she joined in 2018, insight has been centralised to serve all parts of the organisation, and now she faces a new challenge – the function has created such a thirst for knowledge that it needs to double its capacity to meet internal demand.

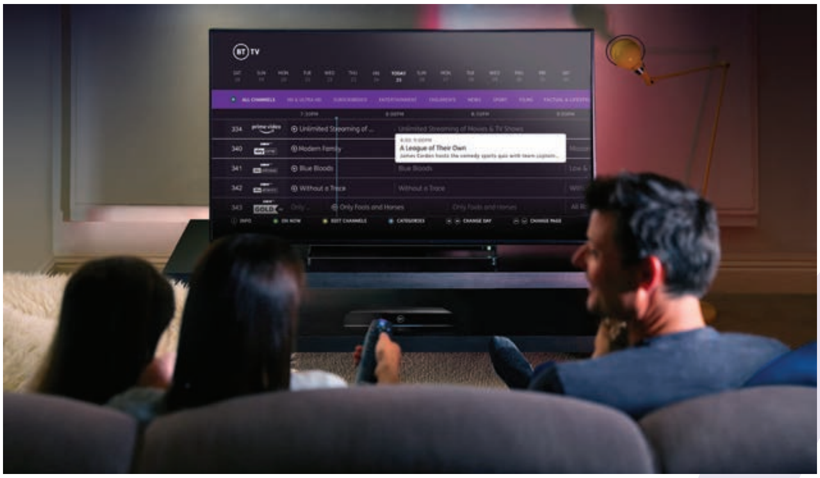
In 2018, the company recognised that insight needed to be a strategic asset to help create a "single version of the truth", says White. Since then, efforts have been focused on laying the groundwork to build one single function after bringing together teams from across BT, EE and Plusnet, and embedding insight into core company processes – leading to a conundrum that other insight professionals might envy – teams wanting more.

"We've created so much pull for insight that we have to ensure we can prioritise and serve that insight. We are quite a large team, but we can't keep growing the team; instead, we have to automate processes, create self-serve capabilities and be as efficient and effective as we can."

White reports to the chief strategy and transformation officer, alongside other strategic functions. The 100-strong insight team sits in a corporate group function working with all parts of the business and focusing on four core areas: marketing intelligence; brand and strategic insight; customer experience; and commercial insight.

An early, simpler marketing message





This central position of insight means the team can get involved in "all levels of decision-making and strategic processes", says White. Among other things, this could mean repositioning, such as BT's 'Beyond Limits' brand relaunch in late 2019, or more regular product or service launches.

"At any point, the team will partner on projects like 'what is the long-term strategy for BT?'; 'what new markets should we enter?'; 'what propositions do we bring to market?'. There's a real variation in what we get involved in, from 10-year strategic projects to in-year activity."

Such a wide-ranging remit also means that making insight more widely available is another priority for White. "We have to democratise insight – it cannot be that it sits in the hands of a few people – that won't drive change in an organisation of 100,000 employees."

All insight produced at BT – as long as it's not confidential or under NDA – is made available to all employees through a portal on a company-wide intranet. The thinking behind the company's recently launched TV packages, for example (see boxout), would not have been available pre-launch but can now be accessed.

There are around 30,000 people accessing and engaging with the portal at the moment. However, White says it's not enough just to make data accessible. "We need to make it intuitive, easy for people to self-serve, and we must use different strategies for engaging different audiences – what we take to the board is very different to what we might take to contact centres."

The insights team worked closely with the product and propositions teams to develop BT Halo

The team is preparing to launch a new portal with an improved do-it-yourself function and machine-learning tools to suggest content based on previous searches. White says they are considering how call-listening activity can be placed there, and reviewing how to support the business to increase the impact of the hub. "If we create the ability but we haven't told anybody how to use the tool or engaged the business, it's fairly pointless."

One of the biggest priorities for White is assessing how to work best to partner with stakeholders from across the business. "Insight is only insight if it drives an action." As part of this, White feels it's important that the insights team behave as leaders. "We need to ensure we are part of the teams across the organisation, so that we feel more like a virtual team."

To do this, the insight function has a business partnering training and development programme designed to help it understand what the business wants from it and delve into people's individual preferences – what motivates and drives them, how they like to communicate and operate, and what role the insights team plays in a business life-cycle. As part of the programme, everyone in the team took part in a series of workshops around core skills.

White is also focusing on ensuring the team is as inclusive as possible, and says she is trying to encourage a less hierarchical approach to the organisation – for example, the person who did the work presents it, instead of it being passed up several levels.

At the same time, she acknowledges insight doesn't always get the final say. "We often don't own the decision-making – the stakeholders do in terms of what they take to market. But we have a key role influencing that decision."

BT Halo was developed as a result of this close relationship, with most of the research done with Basis.

"It was developed as a result of working really closely with the product and propositions teams to work through the benefits that customers would want and the role this could play in helping them connect quicker. We then fed that insight to the creative brief."

Fascinating data

Triangulating different datasets helps BT discover new insights and highlight gaps in its knowledge.

"As an organisation, we have access to some tremendously brilliant, fascinating datasets – we know the benefit when we bring those together with research to help give the 'what' and the 'why' which, I think, is really important."

White says the company combined its internal data – customer data from across BT, EE and Plusnet including firmographics, revenue and product holdings – with external data from Experian, IDC and segmentation insights from recent studies. It then used machine-learning techniques to model the likely wallet for every business in the UK.

"This ensures that we understand the opportunities and where to prioritise the company resources and focus," says White.

When the work was completed, the insight team could give "a holistic view" of BT's market share and give an answer to the question of where BT's existing

Connectivity is at the heart of BT's mission

Testing and learning

In February, BT relaunched its TV packages so that the content customers can access on various plans was more flexible.

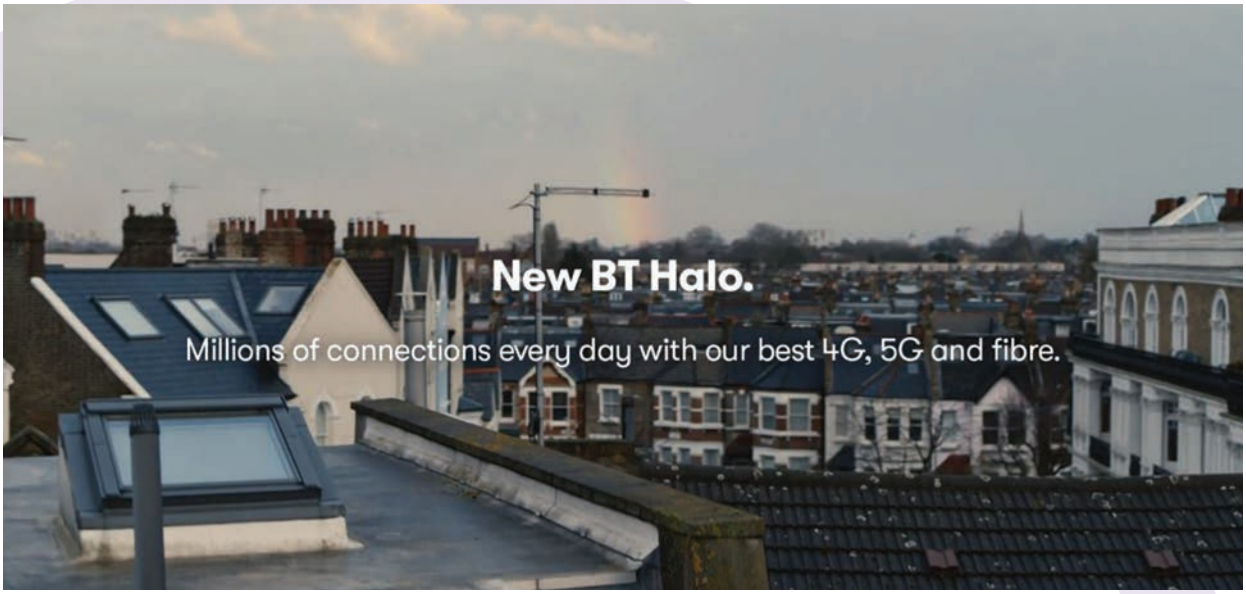
At the start of the development process for the new TV proposition, the approach the insight team wanted to take did not resonate internally, says White. "We weren't successful in engaging the business in the way we wanted to execute the insight plan. We wanted to trial a different approach that we believed would lead to a great customer outcome, but it was a very different way to how we've operated with the business in the past."

While the team did not get the buy-in to the first plan it proposed, it rolled out a more "traditional insight plan" and then moved to a market sizing and propositions test, White says, but then hit another stumbling block.

"The results clearly showed us that the current favoured proposition by the TV teams and positioning wasn't enough to get customers to switch – they were happy with their existing provider, and our offer wasn't strong enough to break that. Price alone wasn't converting."

They then took a step back and worked closely with the marketing and other teams to develop a new, more creative approach to the insight. Firstly, this involved uncovering some initial territories based on behavioural theory, supported by an online community. The team then held co-creation workshops with consumers and followed up with focus groups. Finally, quant testing of various proposition options showed that there was a significant uplift and gave "robust backing" that a flexible approach to the proposition worked.

The team used the new approach to get stakeholders much more heavily involved in the process, White says, helping them act on insights much quicker. "We unlocked new insights that would lead to the proposition being much more successful. We realised that it was really important to get that buy-in."



Advertising for the new BT Halo proposition

products and services should go next, according to White.

Keeping things fresh

Insight is clearly a partner and adviser within the business, and this also applies to how BT works with its agencies.

The company has a hybrid model, with some insight conducted in-house – typically its customer experience research, analytics and marketing intelligence – but the majority of its market research is conducted by a core group of agencies and consultancies: Amethyst, Basis, Decision Technology, Incite, Ipsos, Populus, Sparkler, Strive and The Customer Closeness Company.

"We see these businesses as strategic partners," says White. "They're almost an extension of the BT insight team, and they are hugely important to the performance of my team and us as a business."

She looks to the company's agencies to challenge them and push the team to be more innovative. "It's super easy for us to get caught up in the business-as-usual – the politics and priorities of BT – so how do they help keep us fresh?" One of the ways this takes shape is that the core group of agencies comes in and showcases work from other firms, within confidentiality limits – "helping stimulate ideas across the team", says White.

Additionally, quarterly meetings are held to talk through business priorities and share work from across the insight team to help BT's agencies understand its challenges. "Holding us to account is really important – it's very easy to say they're a strategic partner but if I'm not treating them in that way, then they need to call me and my team out on it."

For White, who held insight leadership roles at British Gas, Capital One and Centrica before joining BT, the company's biggest challenge is also its opportunity – the team needs to be involved in a range of different parts of what is a fairly complex organisation. "This means, as a team, we work on a really wide variety of topics. I love the fact that throughout the day what we are working on really varies – it makes for a stimulating and challenging environment."

Drink like a Dane

A major reorganisation of Carlsberg's insights function has resulted in a shift in focus as it balances global and local research projects. Jane Bainbridge **talks to its insights and analytics director, Jenny Syddall**

With every new image of plastic pollution published, another sector or business feels the uncomfortable gaze of an ever more environmentally conscious public, increasingly aware of the long-term impact of product packaging.

So it was for the beer industry when images of turtles caught up in six-pack plastic rings joined the myriad of depressing ocean-pollution scenes.

For the Carlsberg Group, the answer was to introduce new packaging for its multipacks that used glue instead of plastic rings (also known as yokes) in 2018. It was the first brewer to respond in this way.

This was in keeping with its emphasis on sustainability and ambition for a zero-carbon footprint – its carbon-reduction targets include zero-carbon emissions at its breweries and a 30% reduction in its 'beer in hand' carbon footprint, by 2030.

The company's "good social conscience" is cited by Jenny Syddall, insights and analytics director at Carlsberg, and chimes with its attitude toward insight. "There's a culture of being open to new ideas," she says.

"Our sustainability programme, Together Towards Zero, has targets for 2022 and 2030 in carbon, water, responsible drinking, and health and safety. We are also looking for better solutions across our packaging portfolio, which included the snap pack and a longer-term project of developing the world's first paper beer bottle."

From a market research perspective, Syddall adds: "People are always open to learning, and that makes it much easier to embed insights – and we're not afraid to change course if we think there's a need."

A very clear demonstration of this came at the start of the year, when Carlsberg restructured its insights team. The aim was to ensure that it was giving the business the most appropriate support. "We had this period of reflection, when the business felt we needed to take more of a lead in joining up the dots across functions and being a stronger voice within the business," says Syddall.

The result was a new structure split into five key areas: demand spaces; global brand insights; category and shopper; growth and foresight; and performance and KPI reporting.

The demand spaces' focus is particularly interesting. Syddall describes it as Carlsberg's "motivation and occasion-based segmentation", and it is vital to the business's portfolio planning and brand work.

"We're trying to cluster drinking moments where people have similar motivations for their drink choice," she says. "Consumers' repertoire of drinks tends to be very broad. You think of different drinks and brands depending on the moment; we wanted to unpick the needs and the context of all those individual drinking moments.

"When we created our demand-space segmentation, we were looking across all beverages – alcoholic and non-alcoholic. It allows us to understand where we should position our brands and where the growth is in terms of segments and categories."

"The way young people socialise is changing; they're meeting in running clubs and coffee shops"

New ways of drinking

The melding of alcoholic and non-alcoholic drinking occasions has taken a new direction since the recent surge in low-alcohol and alcohol-free beers. Where once they were only drunk as a form of abstinence, they are now often actively chosen by those looking for healthier options.

In Mintel's recent report on the UK beer market – which it expects to grow by 16.4% over the next five years, to reach £22bn by 2024 – it cited the low-/non-alcoholic beer trend as helping keep beer on the menu for consumers prioritising health.

Syddall agrees: "You've got huge growth coming from the alcohol-free sector, especially among younger age groups, and that's opening up new products and flavours. The way young people are socialising is changing; they're increasingly meeting in places such as running clubs, coffee shops or juice bars – but regular drinks with alcohol aren't always a good fit for those occasions.

"Also, for alcohol-free, those drinkers in the past were looking for a straight replacement for their current brand, and it was often a trade-off, in that they would have preferred to drink their normal product, but perhaps were driving or pregnant. And, if we're

Global rollout of new-look Carlsberg brand

BUSINESS REASON FOR THE RESEARCH – to sync the packaging design with an updated brand positioning. The objectives were for the new packaging to support the brand positioning without alienating current drinkers, and to improve shelf impact.

RESEARCH APPROACH – a global study across multiple markets. During initial, exploratory qualitative research, respondents carried out a shopping trip to collect spontaneous reactions to the different executions. They were then shown a brand video and, through focus groups, Carlsberg explored how reactions changed once respondents had more context on the brand positioning. It then did quantitative research to compare reactions to two routes versus the current execution. This was a mix of central location tests with 2D-printed trade shelves or online research, depending on the market.

IMPACT OF RESEARCH AND ROLLOUT – Carlsberg decoded the importance of behavioural metrics in relation to packaging design and ease of shopping. For example, the end design was more minimalist than the first sketches, reflecting the 'Danishness' of the brand character. The final design is now on shelves across its key markets.

very honest, the products weren't that great, so it was quite a negative experience. Now, it's an increasingly positive choice."

Syddall points to the rise in craft beer – it has a partnership with Brooklyn Brewery – meaning people are often now weighing up whether to have beer or wine. It also has 'radlers' – half beer and half juice – to appeal at different moments.

From an insight and data perspective, alcohol-free brews (AFB) have been a big focus, she says. "I've just spent the past 18 months working really closely with our AFB team to understand trends – how is the drinker of today different from the drinker of yesterday? How are they going to change in the future? It's unpicking it; we're learning a lot about soft drinks because, increasingly, we see our products playing in that space. But it's often quite hard to find an alcohol-free product in a bar, for example.

"Traditionally, beer has been delivered in steel kegs, but the difficulty with them is the shelf life is limited, so bar owners typically focus on high-volume products."

Data streams

Carlsberg has developed a system called DraughtMaster, which keeps the beer fresher for longer, making it easier for bars to stock AFBs.

"The brew lasts longer, so that allows bar owners to provide more variety on tap. We're also working with the trade to understand the problems they have and to try to overcome those," says Syddall.

As well as product longevity, another advantage of DraughtMaster kegs is that they incorporate smart technology, so Carlsberg can collect data such as when the product is served.

"That's a real enabler in terms of our customers' understanding – when they should be switching barrels, what sort of products they should promote at different times of the day," says Syddall.

With so many data streams across the business, she says that the company is "trying to join the dots across the data and navigate our way through it". It has a data hub in Portugal staffed with data scientists and engineers, and Syddall describes her team as the end user of the data.

Changes to its data platform are planned; Carlsberg is working with its IT department to not only have easy access to all its data, but to also have better predictive analytic capabilities.

"Within the business, we're continually getting these new streams of data; so, for example, we've got an app called QServe, through which Carlsberg employees – when they are in a bar or restaurant – can rate the quality of the beer and collect a couple of key metrics. It's a really nice way of understanding our serve quality. It's a bit like mystery shopping, but we're using it in a consolidated way, to understand the total trend," says Syddall.

"Doing research in an on-trade channel, we'll talk to bar owners and staff – they have great insights"

On- and off-trade

Where, once, understanding the differences between on- and off-trade customers was a large part of any drinks marketer's job, nowadays there's not such a gulf in the channels.

"In the past – not just in our organisation, but in the industry as a whole – they were looked at in isolation, but we're increasingly in an omnichannel world," says Syddall.

"We have on-trade venues opening in stores, Uber Eats bringing restaurant-style meals into the home – so we look at them in a joined-up way. Our consumers are in both, so we must understand them more holistically."

From a research perspective, bar staff can be a rich source of information. "If we're doing research in an on-trade channel, we'll talk to the bar owners and staff, because they have great insights. Off-trade, we've got a lot of data – Nielsen, Kantar, IRI and dunnhumby. The on-trade is more fragmented; that comes with some challenges, but we must get out there and talk to individuals in these environments. Sometimes, the techniques are the same across both on- and off-trade channels – for example, shop-a-longs," says Syddall.

Challenging preconceptions

With more than 140 brands across 100 markets, insight must be applied across global and local markets. While Syddall, based in Carlsberg's central office in Copenhagen, is focused on global work, she says there is a "cross-pollination" of ideas. "We're respecting and learning about the local markets, and – where it's relevant – we then scale it up."

The repositioning of Carlsberg in the UK is an example of local markets going it alone. While Syddall wasn't involved in this project directly, she says it demonstrates the way the business thinks. "The company recognised it needed to revisit our brew in the UK, and the local team went with this really ballsy campaign to support the new brew, challenging the 'probably the best' positioning. It said 'we hold our hands up – we don't think we are the best'.

"This was based on a need to elevate the experience of our products and challenge people's preconceptions of the brand. Consumers increasingly want transparent communication and I don't think it would have been enough to just say, 'we've reinvented our brews'. We wanted something that cut through.

"In the UK, we now talk about it being a pilsner, not just a lager – so we've given the brand a bit more meaning. From a central-team perspective, we supported the refresh of Carlsberg's global positioning and branding, which rolled out quite a different pack design for Carlsberg."

Managing data

In terms of centralisation, a major issue for the business – with more than 40 insight and analytics people around the world – is sharing human data intelligence. To this end, it is building a knowledge toolkit – the KnowledgeNet platform – which hosts the data from all its markets. This is not just about servicing the insight team, but rather sharing knowledge with the whole business.

"There are six of us in the central team in group commercial in Copenhagen, but we have a big insight community in the markets. We're keen to work as one team, and share and learn from each other. With KnowledgeNet, you can see before you start a new project what's been done in the past," says Syddall.

Amid these various changes for the insight function, its priorities include better understanding of the path to purchase – hence, category and shopper being one of its five prongs. This means multiple research techniques are being applied from ethnographic research, going into bars and observing consumers and how they behave, and accompanied shops.

Pinning down the best route to foresight is another area in which the business wants to improve. "The challenge is that there's a lot of information, so we need to understand which trends are most relevant and not just a short-term blip. We then need to orientate the whole business around them."

With its toolkit of research agencies and methodologies, Carlsberg has a broad approach – but what does Syddall want to know that's currently not being achieved?

"We're about to kick off some more work on path to purchase. In the past, a consumer's path to purchase was quite linear, but, increasingly, in this omnichannel world – where we're seeing all these channel boundaries blurring – it's more complex. So we're about to start mapping all the points of interaction, and then we'll overlay our demand space understanding into that.

The imperative for the insight function remains the same, however, Syddall says: "Our businesses are changing all the time; it's important in an insight function to put in time to reflect – are we focused on the right stuff, and is there anything we need to dial up or change? The need for research is broad, so we had to explore where will we have the most commercial impact."

"We need to understand which trends are most relevant and not just a short-term blip"

'We Are Family' was the focus of its TV campaign

Chipping in

Insight has inspired McCain's advertising campaigns focused on diversity and differences in families, and is guiding the brand's approach to NPD in a competitive market. By Rob Gray

Frozen spuds are big business, particularly in a country renowned for its love of chips. In the UK, the frozen-potato category is worth more than £700m a year and continues to grow.

As Guinness is with stout and Heinz with ketchup, one brand stands out as synonymous with frozen potato in a wide variety of forms. That brand is, of course, McCain, still family-owned in an era of stock market-listed behemoths, and very much alive to new product development and marketing opportunities as it strives to stay ahead of supermarket own brands and other challengers.

Insight plays a central role in helping McCain keep its competitive edge. Laura Sutcliffe, marketing manager, insight and propositions, has been at the company for six years, and heads a four-strong team "dedicated to understanding what makes our customers and consumers tick". While the team sits within marketing, it supports the whole commercial function of the business and is the champion of insight, making sure that it is part of everybody's job.

The core McCain range – which spans chips, roast potatoes and products for kids, such as mashed-potato Unicorns and Smiles – is aimed squarely at the family market. In recent years, marketing activity has been developed on the back of insights into family teatime.

"It is something that happens day in, day out," says Sutcliffe. "Every family does it. It is often quite chaotic – on the surface, from some of the verbatims we get back from parents when we talk to them about this occasion, it is, 'crikey, midweek teas are just something I need to get through'. But when you dig deeper, there really is so much more to this occasion. There is so much powerful emotion; it's where bonds and connections happen. It is when you're together with the people you care about the most. You can be yourself, you can be supported – you feel safe in a way."

For a number of years, McCain has worked closely with adam&eveDDB, which was recently named Agency of the Decade by advertising industry magazine *Campaign* for a run of high-profile successes, including the John Lewis Christmas ads. When adam&eveDDB began undertaking observational research with parents who represented various consumers, including watching them prepare and share tea with their families, two things stood out.

First, how the value of teatime as an occasion is often overlooked because it is an utterly familiar part of the daily routine – and yet it has emotional resonance and is important to people; and, second, that families don't see themselves portrayed in the advertising they see. This finding is supported by Mintel research that showed almost half the UK population don't think popular culture reflects the reality of modern families, while 84% of consumers couldn't recall seeing anything that featured a family that looked like theirs.

"The more we talked to consumers, the more we realised the problem was that advertising tries to share this idealised, but also very averaged, view of what families are like," says adam&eveDDB executive strategy director Nick Hirst. "That means we ignore, almost by definition, 90% of what families are like, and families come in all shapes and sizes. That is really the truth of it. That is what got us onto this thing of, if you are trying to show what families are really like, you have to show a much broader range of families than perhaps the advertising community has been showing."

Adam&eveDDB used a recruitment agency to source participants for this exercise, with the whole team on the campaign visiting at least one family, and around six families visited. These insights were the genesis of the 'We Are Family' series of TV ads featuring a cast of real people chosen to reflect the diversity of modern British family life.

Participants had to be comfortable on camera and happy to be part of a broadcast advertising campaign, but – at the same time – couldn't come across as 'stagey', as that would puncture the naturalism and authenticity desired.

"Advertising tries to share this idealised, but also very averaged, view of families. That means we ignore 90% of what families are like"

Lighter Home Chips was a response to heightened public interest in health and wellness

The approach has proved successful, but one of the executions, featuring two dads and their baby son, hit the headlines after it triggered a wave of homophobic abuse on social media. Sutcliffe is quick to point out that the trolling came from a small minority and that it in no way affected McCain's stance.

"It is our philosophy and commitment to remain representative of modern life and, as such, we have to stand by that," she says. "We remain fully supportive of everybody who is part of our advertising and we have to make sure that we are responding to any negative press or feelings in the right way. It has not put anybody off; we are about championing diversity and being on everybody's side."

Celebrating difference

As the 'We Are Family' campaign evolved, McCain decided to shift the focus from diversity and differences between families, to acknowledging the diversity of viewpoints and differences within families.

Sutcliffe says: "It was important that we uncover, first hand, what families talk about at home and at mealtimes – how these differences emerge – and celebrate the emotional impact of these differences."

"Nation's Conversations is not seen as a one-off, but as an ongoing research index to observe, celebrate and better understand families"

McCain has launched cook-from-frozen snacks to tap into the craft beer trend

McCain commissioned nationwide quantitative research from OnePoll, which surveyed 3,000 adults to uncover what families talk about at home and highlight the different opinions within households. The 'Nation's Conversations' report, published in summer 2019, found that 90% of respondents claim to use dinner time as an opportunity to express differences in opinion on a large variety of issues. More than four-fifths (82%) of those surveyed agreed, or strongly agreed, that it's a good thing for families to hold different views and sometimes disagree on things.

The work also involved qualitative research with families. McCain used commentary from this research in its 2019 'Differences' commercial, narrated by Ricky Tomlinson, which sought to celebrate the emotional impact of differences in opinions and behaviour – again through the lens of mealtimes.

Hirst says the team knew they "had it right" when they showed an early script and a participant in a focus group "got quite animated, saying 'yes, exactly; my friend is an adoptive parent and, finally, someone is making an ad that's for her'".

'Nation's Conversations' is not seen as a one-off, but as an ongoing research index that aims to continue to observe, celebrate and better understand families. The thinking is to track ongoing conversations and uncover emerging important issues in families. Inevitably, the intra-family divides over the emotive issue of Brexit was one of the major issues highlighted by the first report, with 70% of respondents saying they had talked about it at the table, making it the main political topic of discussion.

The new advertising has delivered commercially and in terms of driving emotional resonance for the McCain brand; it has achieved 79% spontaneous brand awareness, according to Kantar brand tracking.

Subconscious approaches

Away from brand communications, the insight and propositions team supports new product development (NPD) and studies consumer shopping behaviour in real and simulated retail environments.

The Harrisons were included in the 'We Are Family' campaign

This extends to accompanied shops, eye tracking and observing what draws attention at in-store fixtures. Tools such as QSR International's NVivo are used to glean insight from qualitative data from a variety of sources.

Despite the greater use of technology to make sense of mixed-method data, Sutcliffe and her team still like to get out into the field when time allows. "Accompanied shop is really interesting because you get more of the qualitative and conversation behind the decisions they are making in that environment," she says. "We don't do them every week; we do them when we need to answer a specific question."

Despite the "amazing methodologies" now available, Sutcliffe believes there is nothing more powerful than ethnography and stepping into the shoes of the consumer. She is fascinated by behavioural science – notably, some of the theories on heuristics outlined in *Thinking, Fast and Slow* by psychologist Daniel Kahneman.

Given the quickfire decision-making of supermarket shoppers, Sutcliffe is especially drawn to System 1 thinking: fast, subconscious, emotional choices. "I am quite interested whenever I see proposals back from agencies to see where, within their methodologies, they have got that kind of principle around System 1 responses from the consumer."

On the NPD front, interpreting trends is a fundamental part of the team's role. Knowledge of what people want now and in the future is applied to inform and inspire the business. Needless to say, the health and wellness trend has had an impact, most obviously with the successful launch of a lighter version of flagship product McCain Homechips.

Other waves ridden by McCain include the food-delivery boom. "In our time-pressured lives, there's the need for immediacy and spontaneity," says Sutcliffe. The company has launched a new proposition in this area – McCain SureCrisp – which it says will stay crispy for longer. It has also recently launched a range of cook-from-frozen snacks, aimed at consumers and the on-trade, to tap into the craft beer trend.

So while it will remain synonymous with chips, McCain is a brand looking to remain relevant to its shoppers – in all their glorious diversity – thanks to ongoing use of insight.

In the hands of **employees**

In the current economic climate, there has been a glut of stories about company acquisitions. But, amid the traditional takeovers, a less trumpeted business model has been gaining attention – employee ownership. By Jane Bainbridge

For years, the John Lewis Partnership (JLP) has been the go-to example whenever a company eschewing the traditional capitalist business model is cited. As the largest – and best known – company owned by its employees, it has long been heralded as proof that a large business can thrive without the scrutiny of the stock market, venture capitalists or founding directors.

JLP has, for a long time, cut a lonely figure for industrial democracy, but that is starting to change. Over the past couple of years, some other large businesses have chosen to adopt this alternative model as they plan for their future, including Richer Sounds, Aardman Animations and Riverford Organics.

The appeal of an alternative structure reached the market research sector at the start of the year, when BritainThinks announced it was moving to an employee trust model.

So why the attraction for employee ownership (EO)? The Employee Ownership Association (EOA) points to specific benefits – employees tend to be more entrepreneurial and committed when they are co-owners of a business. This can lead to a more profitable and sustainable company, as well as help to retain talent and boost recruitment.

Another crucial factor made handing ownership to employees a more appealing proposition however, and that was the government establishing the Employee Ownership Trust (EOT).

Graeme Nuttall is a tax and structuring partner at law firm FieldFisher, which advises on EO. He also led the independent review into EO in 2012 for the Department for Business, Innovation and Skills.

Before the Nuttall Review, governments had only promoted employee shares as an add-on to the traditional business model, another form of financial incentive; but being able to hold employee shares in an EOT was the catalyst for a new business model.

"The EOT contains various safeguards to ensure EO is genuine, and there are two nudges in the tax system to give that final incentive to look at the idea. The first is there's a complete exemption from capital gains tax for individuals selling a controlling interest in an EOT; the second is that once the EOT holds the controlling interest, it may pay bonuses to all employees up to £3,600 each tax year, free of income tax but not National Insurance contributions," says Nuttall.

Structural decisions

Setting up an EO structure can be simple and straightforward. The key is to "make some careful, upfront design decisions that will stand you in good stead over the years to come," says Nuttall. "The main decision is to choose between whether to have trust ownership or direct ownership of shares, or a mix of the two. The simplest route is trust ownership, where shares are held on behalf of employees but not directly by employees. This makes it easier for people joining and leaving the company."

EO is particularly popular for businesses where the owners are looking for a succession plan. "EO can work in start-up and turnaround situations, but all the growth since 2014 has been in succession situations," says Nuttall.

Ben Shimshon is one of BritainThinks' three founding partners, along with Viki Cooke and Deborah Mattinson. He says deciding to move to EO wasn't so much about succession planning as retaining the agency's culture.

"There are no plans for anyone to leave the business or retire, but it's definitely the case that the strategic future is held across broader shoulders than just Deborah, Viki and I.

"We set it up in 2010 and it's grown to almost 50

people. We felt very happy that we had built this and responsible for what we'd created, but the future will be much more shared among everyone who works here. The value of the company resides in its people, and the quality of people we've attracted and retained, so it feels right," he says.

Maintaining the culture

While many similar-sized market research agencies are being bought up, BritainThinks took this alternative route. Shimshon says: "It was a way for us to realise some of the value that we'd created as founders, without compromising in terms of culture. We'd talked about and considered trade sales, and had some offers at various points. Every time, the stumbling block was what it would mean for the culture of the company; this way meant we could realise some value but maintain the culture and independence."

However, realising the value from the business through EO is not a quick process. Nuttall says: "Essentially, the money comes from the profits of the business. In some cases, the employees may be prepared to invest, but generally it's the company that's got to generate the money. Even with a bit of bank finance, it's still going to take a few years, possibly as many as 10 years, to pay the owner in full."

Shimshon says setting up the EOT was relatively straightforward – helped by the fact that BritainThinks' structure wasn't complicated in the first place.

"The key aspects were reaching a valuation, agreeing how much to transfer, and finding a chair and independent trustees to run the trust.

"In the short term, the EOT has taken ownership of 60% of the shares of the company, a controlling interest, bought as an upfront consideration of cash in the business and a deferred consideration that will pay out over a few years."

"The key is to make some careful, upfront design decisions that will stand you in good stead over the years to come"

Moving to EO doesn't rule out the business being sold, although it's more generally used when the owners want the business to remain independent.

Shimshon says: "We're not ruling [a sale] out, and we think that with the right partner that's a really attractive future for the company and a way to create new opportunities for growth. But in the conversations we've had about it, each case so far, we've been worried about the cultural impact."

How easy it is for an employee-owned business to be bought depends on the ownership structure. If the original owners want it to remain independent, they may build in defences against takeover, such as needing 90% of the employees to support a sale.

But EOTs are not the only way of giving employees equity. Market research agency Opinium has given a total of 33% of its equity to individual employees – at all levels of seniority – over the past 10 years. Its aim is that this will eventually reach 50%.

Its CEO, James Endersby, explains: "To build a successful agency, you have to put your people at the heart of everything you do. There are hundreds of ways we do this, but ownership is the ultimate cherry on the top, and we wanted our people to be able to own a share of their success story. We are more than 50 people now, have had 11 years of double-digit growth, ever-rising levels of employee wellbeing, and hold three 'best place to work' awards."

Employees must have worked there for at least two years to be considered for partnership but, beyond that, it's "purely based on their contribution to the growth of our agency, be that through their outstanding contribution to client work, operations, agency wellbeing, project work, business development or marketing".

Opinium releases equity based on a profit and growth formula. "The more we all grow the agency, the more equity we can release to reward existing and future partners," says Endersby. "In terms of set-up, it can actually be simpler than setting up a limited business that has shares to administer and an employee share scheme."

For Nuttall, whether EO is suitable for your business or not comes down to two questions – is it right for the existing owners, and is it right for the business?

"You need an owner who is prepared to wait to be paid in full for their shares – and someone prepared to let go – and a business that can continue to grow without the owner's input."

A professional view

Can industry standards of professionalism be maintained while pressure mounts for ever faster and cheaper insight? Christian Walsh**, digital director of MRS, chaired an MRS Delphi Group discussion on this**

At the end of last year, the MRS Delphi Group convened to discuss what constitutes that vital quality of any thriving sector – 'professionalism'. What does professionalism in the research sector look like, whose responsibility is it, and how do we make sure it is valued and embedded in the business of research for the new decade?

The focus on professionalism is the first element in a three-part action plan for the sector in 2020, as proposed by Jane Frost, CEO of MRS. The plan covers: professionalism and ethics; a shared narrative; and inclusion and talent.

Jane Frost, CEO, MRS: "MRS has been relentless in its pursuit of standards, ethics and professionalism – to defend our margins and eliminate bad research. A large FMCG client told us they were getting really stressed about the level of professional delivery they were getting from reputable agencies, with basic failure around questionnaire design and sampling."

What do we mean by 'professionalism' in the context of the research sector? Is this different for data analytics?

Phil Sutcliffe, UK board director, Kantar TNS UK: "Professionalism is adhering to high standards of quality throughout the research process: how we interact with consumers; the techniques we use to get insight from them; how we analyse the data; and how we deliver insight back to business or government. Data isn't different – it's just a component of that."

Gemma Procter, partner, Sparkler: "The fragmentation of our industry means that levels of professionalism and standards have started to differ – particularly on the 'data analyst versus qualitative researcher' side. I don't think there is anything at an industry level that is speaking both languages."

PS: "Data is now all-pervasive in industries, which is both a good and a bad thing. A lot of people who don't understand the potential bias in the data are making decisions off the back of it."

Colin Strong, head of behavioural science, Ipsos Mori: "I've worked in this industry long enough to be very familiar with that kind of bias complaint. If you're going to put people under more time and budget pressure, what is delivered back to you will be eroded. We need to be a bit careful about putting the responsibility for professionalism purely on the shoulders of agencies. It's a collective responsibility and we need to understand what everybody's collective roles are."

Rhea Fox, head of insight and strategy, Aviva: "I haven't felt a decline in standards. What worries me on the professionalism side is that there appear to be a lot of start-ups who are selling insight – get it back faster, cheaper – but they don't seem to have credentials. The data industry has sold a very compelling story to stakeholders that data can solve everything. When you're client-side, half the job at the moment is helping stakeholders realise what data can solve and what it can't, and when a conjunction is needed.

"The only other factor may be that, in the old days, everyone graduated and went to Millward Brown, and read data tables for two years and learnt the basics, and that's not a route anymore."

JF: "Some still do. Ipsos puts everyone through the basic MRS qualifications."

Do organisations understand the risks of faster, cheaper research?

RF: "The trap that insight teams sometimes fall into is thinking: 'If I deliver really fast, everyone will love me.' But once you're in that space as an insight team, it's very hard to pull yourself up the strategic spectrum. Practically impossible."

GP: "Research just becomes a validator, rather than starting at the beginning."

RF: "Clients need to be more disciplined and recognise that if you need an answer in half an hour, it's probably not a game-changing decision."

PS: "When done well, automation should be an enabler of better insight. It allows professionals to think more about the decisions to make off the back of it, rather than that onerous process of capturing the data. But automation needs quality baked in, and that's often not the case."

CS: "From my experience, if you have somebody who has come from a data analytics tradition, they will have an optimistic view of what insight you can get from data.

A well-rounded professional researcher will tell you how to think about it more holistically – and call out conclusions that are inappropriate from those different research assets."

PS: "I often hear the refrain 'we'd rather have 80% right in a week than 100% right in two months'. But I suspect the people who get the 80% are not aware that it is only 80% right, and there's more risk involved with that data.

"We need to remind people of the purpose of research; that this is enabling people to make better decisions – it's not black or white. DIY research, for example, serves a certain value if you want to know if it's 'concept A' or 'concept B. But it won't tell you how to make 'concept B' better – that's where someone who's experienced, working in a certain area, can offer guidance on how to do it better."

Should agencies push back on clients to protect standards?

RF: "How big is the risk of the decision being taken? If it's a question of this ad or that ad, well 100% right is better. But most things enabled through research, apart from huge projects, are not that big a risk. So I do have sympathy with the 80% rule."

Nick Baker, UK CEO, Savanta: "As people are rising up the ranks from junior levels, there is a much lower understanding of core craft skills. Very few people understand basic principles of representivity and how to design fit-for-purpose research."

CS: "With the jump to director, there's this intangible element called 'judgement'. You may write a half-decent questionnaire and put some slides together, but exercising judgement is about saying to the client 'if the question you are asking can be answered directly by the research findings, you're probably not asking a big enough question'."

GP: "As a client, I didn't feel agencies were challenging enough; they were so eager to have the job and say they were working with the brand, it almost blindsided them."

RF: "You can have a director who understands business, and has good judgement and is supported by a strong technician. I don't think everyone has to have both sets of business and craft skills."

CS: "I agree, and this is why professionalism is a collective act, not an individual one."

PS: "One thing that has come out through this discussion is there's a need for better dialogue and mutual challenge between agencies and clients. Unless you're experienced and can use judgement, that challenge isn't made and, ultimately, the client doesn't get the insight to answer the fundamental question because it was hidden through the process."

RF: "What impresses me is a willingness to see what has already been done and come back and say, 'actually, we think the high-level question you're trying to answer is X'. Sometimes, even if that's wrong, it's evidence of a higher order of thinking.

"I think that's why management consultancies are increasingly eating the lunch of the research industry, because they generally have a baseline understanding of how to manipulate data and how to write a survey – they teach it in MBAs. Then they have business credibility. That's all part of their training."

CS: "We all know good when we smell it and see it, but we struggle to define what that is. We [Delphi] could be doing some work to define what a good practitioner looks like beyond the craft skills. In any agency you'll find there are 5-10% of people who can do it. But you don't need everyone to be like that – you still need lots of delivery. I feel it would be useful to try to define that 5-10% of people in agencies who really know how to think and respond to a brief and ask those questions."

JF: What are the three questions you'd like to be asked by agencies when you give a brief?

CS: "Maybe we can also do it the other way around – what are the three things you'd like your client to ask you? I know it's a service industry, but – going back to professionalism – it is something created by a network of people working together with different skills; it's recognising what each person brings to the party.

"There's something here about recasting professionalism as an emergent quality that operates within the programme of work."

Follow-up: the group agreed that it would be valuable to ask a selection of agencies and the MRS senior client council for their three questions – what they wished they'd been asked when giving or receiving a new project brief

The coronavirus market effect

With stock market valuations higher than in 2000 and debt levels greater than in 2008, Covid-19 looks like the black swan event, the systemic shock – like 9/11 or Lehman Brothers – that ends this economic cycle and heralds the next recession. A cascading of events in a globally complex and interconnected world.

The system can handle 'contained' shocks, such as Argentina defaulting, the Greek debt crisis, the Asian tsunami, or the Japanese earthquake/Fukashima death toll, where collateral damage is, to an extent, contained and limited. What the market cannot do is price in systemic hidden risks.

Looking back at the global financial crisis (GFC) is a useful exercise. On 7 February 2007, HSBC announced losses related to Household International's sub-prime mortgages. If it had just been HSBC, the market would have looked through it, but – as history proved – 'lax lending standards' was a virus that had infected huge swathes of the global financial system. New Century Financial filed for bankruptcy in April 2007, Bear Stearns' structured credit hedge funds collapsed in June 2007 – and the rest is financial history. The market bottomed out two years later, in March 2009.

During the GFC, the global economy took multiple body blows (mostly in the financial and real estate sectors), but not all at once, which meant there was time for markets to try to adjust. More importantly, there was a 'medicine' that prevented the 'patient' from dying – lower interest rates, quantitative easing (QE) and fiscal stimulus.

How is it different this time?

Now, the global economy is taking body blows all at once. Covid-19 started in China, but has now spread to more than 60 countries. It comes at a time of growing stress points in the global economy: the regular cycle exhaustion (10-plus years of economic expansion); structural industry issues in auto and retail; trade and tariff wars; global indebtedness; and political uncertainty, with Brexit, riots in Hong Kong, German turmoil and US elections at a time of peak margins and multiples.

Covid-19, though, can be the straw that breaks the camel's back because it is, effectively, grinding global trade to a virtual standstill – and monetary and fiscal policy will have limited impact now. What good is a 50 basis points rate cut if people cannot travel or do not want to travel? If it is one-off in nature – a one- or two-quarter hit to economic activity with transmission slowing and a vaccine in the near future – then investors should be buying the dip... but this is hardly a dip.

If this persists before a vaccine is found (let's call it a year) and transmission continues, then global GDP is in for a demand AND supply shock. Beyond that, behaviour and travel patterns change more semi-permanently – and, with that, global trade flows and foreign direct investment.

If Covid-19 festers, will tourists or business people travel to Asia or the southern Mediterranean or Europe if it takes hold there? Will corporates shift their supply chains closer to home? What happens to loans that cannot be serviced – do banks roll them for three months, six months, a year? And what happens to working capital when just-in-time breaks down? If companies can source input elsewhere, do they pass on the higher cost or take the margin hit? The questions and scenarios are endless.

And belatedly it's been declared a pandemic/ state of emergency

Call me a sceptic, but beyond scaring people, I suspect declaring a state of emergency or a pandemic is a 'get out of jail' card for a contract or event – so avoiding that scenario would have prevented financial contagion (think insurance contracts, banks, loans). What takes precedence, economic activity or human lives, recognising that – if economic activity grinds to a halt – human lives will be impacted regardless?

What happens next?

The market needs a new playbook because this looks unlike anything the global economy has seen before – so widespread and so sudden, unlike previous concerns over rising rates or trade wars. Any green shoots? There are reports that the Chinese government is getting people and factories back to work, but it is a slow process – and the risk remains that, as they return to work, we see a resurgence in Chinese cases. An unknown unknown.

● *This column was written in March 2020*

Giving values a **voice**

Ellis Parry joined the Information Commissioner's Office (ICO) as its first data ethics adviser at the end of 2019. *Impact* caught up with him to discuss how organisations can build a more ethical approach to data

What are your responsibilities, and what is the ICO's role in this space?

My role is to articulate the interplay between the data protection principles over which the ICO has regulatory oversight and the emerging field of data ethics, and communicate and consult on those views, raising awareness and buy-in to the mutually reinforcing nature of the concepts underpinning each discipline.

The majority of people feel it's important that companies use their data ethically, but few trust organisations to do this, according to Open Data Institute research. What needs to be done to build trust?

The ICO's mission is to uphold information rights for the UK public in the digital age. The number one goal of the ICO's Information Rights Strategic Plan is to increase the public's trust and confidence in how personal data is used and made available, by creating a culture of transparency and accountability.

What are the key ethical blind spots for businesses and organisations?

These are quite context specific. Articulating their values, the principles that enable those values, and building those into their decision-making processes can help organisations identify and deal appropriately with the ethics raised by their proposed personal-data processing.

What practical steps can companies take towards a more ethical approach to data?

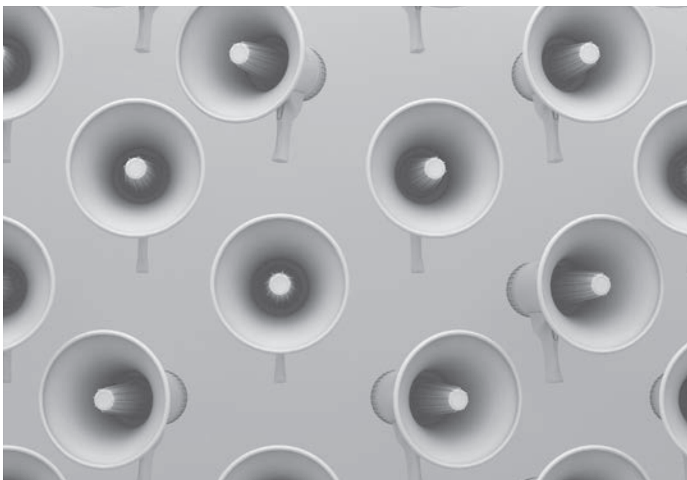
As part of establishing and building a culture of transparency, fairness and accountability, organisations should share their values and behaviours, and make suitably senior people responsible for ensuring they are considered and subject to continuing review at the appropriate stages of their process-based governance frameworks.

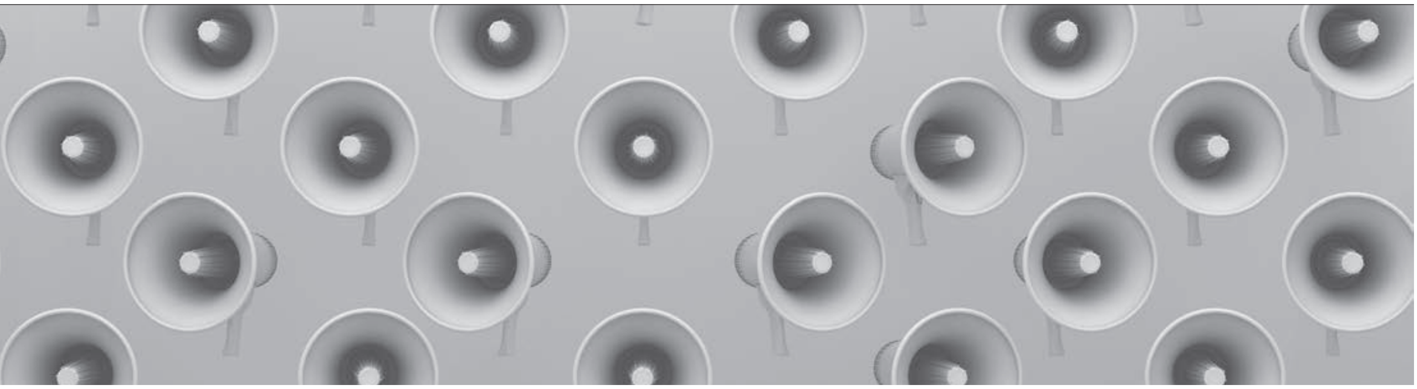
Are organisations too focused on consent at the expense of data ethics?

Much has been said on the limitations of consent as a lawful processing ground, given the novel possibilities for processing personal data that technology is now making possible. I view robust, structured and recorded deliberations on the ethics of any given proposed processing as a tangible step towards organisations showing a culture of accountability. For public authorities, those deliberations could be made public – private organisations should consider whether that level of transparency would be appropriate, too.

How does data ethics overlap with data protection? Do organisations need to reframe how they think about data to place more focus on people?

Many of the publicly available data ethics frameworks have a human-centric approach as their foundation. So we will be talking to stakeholders about what, in their view, is the intersection between the data protection





principles and data ethics, and how a conversation based on society's collective morality can promote adherence to the GDPR's inherently ethical principles.

What's the biggest challenge in balancing the rights of individuals with what's best for society – for example, in the case of facial-recognition technology?

The question encapsulates the answer! The challenge is striking the right balance between those two potentially competing and yet allied interests.

Framing the debate in ethics can help organisations apply the GDPR's principles appropriately, in particular, as part of any legitimate-interest impact assessment.

In relation to facial-recognition technology, the ICO is considering how the private sector uses this technology for locating and identifying people, including when it's used with law enforcement.

The law is different for the police, and the ICO has already published a Commissioner's Opinion, which gives clear instructions on how police forces should be using live facial-recognition technology.

How is it possible to reach a consensus on the ethical use of data?

Each scenario will be quite context specific, but this illustrates one of the benefits of organisations stating their values and principles.

Ethical considerations 'move with the times' as society's prevailing attitudes change. Adhering to a code of conduct or being a member of a certification scheme can help organisations prove they are accountable for how they are processing personal data within agreed boundaries.

The ICO has recently published guidance for organisations wanting to develop GDPR codes of conduct or certification schemes. Organisations can submit their proposals for these to the ICO for approval, which will be an asset to businesses, helping data controllers and processors demonstrate compliance with the GDPR.

Can ethics be regulated?

The ICO does not regulate purely ethical considerations, but given the inherently ethical nature and language of the GDPR – in particular, I'm thinking about fairness, transparency and accountability here – the supervisory authorities can take steps when they see breaches of the law.

What is your biggest concern over approaches or technologies not designed with data ethics in mind?

That they may, by design or inadvertently, entrench discrimination against sections of society, having a negative impact on mankind's freedom to grow in a diverse and pluralistic environment.

How can discussions about ethical data use keep up with technological innovation and new applications of data?

It may be that the black-and-white letter of the law could be perceived as not moving quickly enough to regulate, with surety, rapidly evolving technology. By and large, organisations want to do 'the right thing', but may not have a clear view of how to successfully apply the GDPR's principles in novel situations where there is no precedent.

This is exactly where I think viewing a proposal through an ethical lens can help illustrate the legal issues more clearly, as social mores are more agile than black-and-white letter law and, therefore, more adept at keeping up with the rate of technological innovation, and signposting how it should be governed for the benefit of the whole of society.

Sustainable analysis

I had one of those lovely moments as a parent recently when homework overlapped with my work. Discussing with my nine-year-old son the benefits of a line chart versus a bar chart was much safer ground than trying to help with prepositions.

A more challenging homework topic is sustainability and, in my house, like many others, it goes beyond a school assignment. Whether it's an insistence on ditching plastic straws, rejecting plastic water bottles or avoiding palm oil products, there is a genuine passion in my children to change our day-to-day behaviour and contribute to a sustainable ecosystem. The challenge I'm facing at home is much the same as that facing our clients and the industry at large – and it has got me thinking about the role of data analytics in helping us to meet this challenge.

I presented recently to the FMCG industry on key trends that will influence consumer behaviour over the next decade. We covered what will be important: the accessibility of 5G; the way we view convenience in our daily lives; and the need for our purchases to be instantly available. But the topic of discussion that really grabbed the audience was sustainability.

"It doesn't matter what type of business you operate in – sustainability requires our attention"

It doesn't matter what type of business you are in – sustainability requires our attention. It is a broad-ranging topic, and I believe that data and analytics play an important role not just in the debate, but in helping the industries we operate to navigate it effectively.

As always, there are trends in public opinion that help to shape our society, and the memorable image of an ocean of plastic in a BBC documentary helped to bring a complex issue to life, making it personal for viewers. From then on, it has gained momentum. Our role as data analysts is to see if these big topics are not only changing attitudes, but also whether they translate through into behaviour. It is by analysing these attitudes that we understand the expectations of shoppers and consumers.

Understanding the influencers that are making changes will be vital to all brands in any sector. Behaviour is changing. Consumers are more likely than ever to consider waste, sustainability and brand reputation before making a purchase and brands and retailers will need to act on this information.

There's a big role for the market research industry to play in providing the data that gives more transparency to the debate. To date, the question of sustainability means being blinded by scientific fact or fiction, dependent on your view. Data analytics means we can cut through with data that illuminates what we buy, what we throw away and, from that, how we – as consumers – contribute to a global problem.

Through this lens, it will be easier for business and the 'average' person to digest as we personalise the story and bring the debate much closer to what we all do at home. Nielsen gives data to the United Nations as part of the sustainability debate, and I only see contributions to this type of work becoming more important for UK data organisations.

Historic behaviour is one thing, but analytics also needs to forecast what the outcome of our consumption patterns will mean. There is already a debate about whether we have gone beyond reasonable levels of consumption in many areas of our daily lives. But as new patterns of behaviour develop – for example, consuming more meat substitutes, the removal of plastic and the move to electric cars – our industry must call out what impact it is having. We will need to predict the good and the bad of these changes, by drawing on quality data to enable robust predictions that support industry in making changes for good.

This will take more than us producing a simple line chart. Our ongoing homework is to give a clear and transparent message on consumption and its impact, which will be essential to cut through the sustainability noise and provide the industry with guidance from which we will all benefit.

Emotional **connection**

Emotion-AI start-up Looxid Labs is aiming to take virtual and augmented reality one step further, by connecting with people's brainwaves. Jane Bainbridge **talks to its CEO, Brian Yongwook Chae, to find out more**

Virtual reality (VR) is not exactly new technology anymore, but, to all intents and purposes, we're still at the early adoption phase of its product life-cycle.

The hardware has remained expensive, and this has been one factor holding back wider take-up. But, inevitably, as prices come down and the experience becomes more 'real', adoption rates are expected to rise.

Estimates on the size of the market varies, but Fortune Business Insights predicts the global VR market will reach $120bn by 2026 – compared with $7bn in 2018.

At South Korean AI start-up Looxid Labs, work is already under way on taking VR to the next level, by integrating biometrics into a VR, augmented reality (AR) and mixed reality (MR) platform.

It has developed a user interface – Looxid Link – that can connect people's minds to VR. It works by incorporating brainwave sensor accessory modules and its software development kit (SDK), so a person's brainwaves can be measured while they're in a VR environment. It measures aspects such as relaxation, attention and brain activity, as well as types of brainwave frequencies.

Brian Yongwook Chae, CEO of Looxid Labs, describes how the connection works. "A head-mounted display (HMD), like you get on all VR headsets, is a vital part of the immersive VR experience. Since the HMD is in contact with the forehead to acquire biometrics, it's easier to get users' cognitive and emotional states, such as their attention/relaxation level."

Chae's background is in brain-computer interface, which is why he first considered integrating biometrics – such as the eye and brain data – into the VR/AR platforms. Then, he says, it was all down to the data.

"For a new digital platform to become popular, you have to consider both the characteristics of the digital platform, such as what data to collect – log data or location data – and how to analyse the user to give personalised content that improves the experience," he says. "As VR/AR industries came into the spotlight for gaming, commerce, healthcare and education, it became necessary to develop the right data and data analytics that are compatible with VR environments."

By integrating biometrics, VR companies can use their better understanding of the user and their reactions, and apply this to create a more interactive VR experience. For example, VR game companies can associate the player's cognitive and emotional states – such as attention – with a superpower; so, the more the player pays attention, the better they can lift an object with their mind.

Chae says: "A lot of what goes on in the mind is at a subconscious level." He mentions specifically how that plays out in an automotive example. "You can see the types of reactions consumers are having [with the VR car clinic] to different parts of the car. Measuring and analysis via electroencephalograms (EEG) moves beyond 'what' to 'why', by helping you see what sort of brain activity is used at these stages, telling you about what is shaping the decisions of a consumer."

Other real-life applications include in healthcare, where clinical biofeedback has been used to treat stress, anxiety and depression. It's been employed, too, for goalkeeper training, where workload and engagement indexes during the VR training can be analysed using EEG signals to improve performance, while it has also been used to help understand how a shopper chooses products in store.

When choosing between brands, a shopper's brain is firing millions of tiny electrical impulses; by mapping different activity areas, EEG sensors detect which parts of the mind are active during shopping. "VR research draws some compelling neuroscientific insights about what is going on in a shopper's mind," Chae says.

So how accurate are the brainwave feeds, and how exactly do they work?

"The brain's neurons and synapses are interconnected, forming a vast network. Neurons generate an electrical field, which is strong enough

to spread through tissue and bone and can be measured from the scalp. Each neuron is composed of a body and dendrite, making it possible for neurons to communicate with each other. When the brain reacts, these neurons release chemicals, called neurotransmitters, to neighbouring neurons. Neural networks construct information and create an electrical field through the changes in the chemical balance in the brain. The sensors in EEG machines quickly pick up these electric fields in a very precise manner, which are later used by amplifying these recordings.

"EEG allows us to record the voltage changes for post-analysis that can help us determine if there are certain incongruencies in patterns, and understand how our brains operate and react under certain conditions. As EEG monitors the time course of electrical activity generated by the brain, you can interpret which areas of the cortex are responsible for processing information at a given time," says Chae.

When it comes to any technological leap like this, it also requires the hardware and software companies to get on board. To date, one of the VR headset manufacturers, Vive, has shown interest in Looxid's technology and selected it for the latest wave of its accelerator programme. And its work with software partners is ongoing – one current application is with NextUs, providing VR treatment for occupational accident trauma for firefighters with post-traumatic stress disorder.

Chae believes that combining biometrics with VR is a "game-changer" and will significantly boost VR sales, which he thinks have so far been sluggish because of the expense and/or discomfort of the VR headset.

So what areas will be most likely to embrace VR/AR in the future?

"It is difficult to say. However, as VR can give users immersion and presence, medicine and psychology are embracing it to examine various clinical therapies – such as exposure therapy to treat some anxiety disorders, distraction therapy to reduce the pain of dental procedures, and more.

"VR will be a promising tool for medical treatment as those are difficult and costly to be controlled in a real-world setting."

The age effect on making decisions

We're all familiar with the ever-growing evidence from behavioural science that we are highly prone to different cognitive biases that affect our thinking, judgement and decision-making – from optimism bias and present bias to framing and anchoring effects. But scientists are also beginning to understand how our susceptibility to certain biases changes throughout our life, from childhood to old age.

Contrary to what people sometimes think, our brains do not fully mature until our mid-20s. Then, as we enter our 30s, some functions in our brain – our reasoning ability and logical problem solving – begin a slow decline. Happily, for the most part these declines are offset by our increasing knowledge and experience of the world. In fact, some argue that we have the capacity to make our best decisions in middle-age (*The Age of Reason*, Agarwal, S, Driscoll, JC, Gabaix, X, Laibson, DI).

Neuroscience research suggests that our brains continue to develop until we are in our 40s, and that the brain is always plastic, and highly adaptable to our surroundings and current context.

By our 60s and 70s, though, an overall decline in cognitive function is unavoidable, and this feeds into several other changes in our thinking and decision-making. This means that we may be more affected by certain cognitive biases – for better and worse – at different times of our lives.

There are two key findings from the latest research on ageing and the brain, and the differences age can make to judgement and decision-making.

The older we become, the less adaptable we are as thinkers

It is now well established that younger people tend to rely more on their analytical and reasoning skills – known as fluid intelligence – to make decisions, whereas as people age they tend to draw more on their knowledge and experience – known as crystallised intelligence – to make decisions. But how do these processes affect their decision-making? Who makes the 'better' decisions?

New research published in 2019 found that for simple decisions, the experience-based processes and shortcuts older people draw on to make their choices are a good match for the more analytical processes younger people usually draw on. However, for more complex decisions, younger people are at an advantage (Brocas *et al*).

This reliance on experience and routine can also make older people less open to finding new solutions. A study by a team (Harris, MA, Wolbers, T) at Edinburgh University found that older people (aged 61-79) were far less likely than young adults (aged 18-29) to switch from following learned routes to finding novel shortcuts in a virtual town environment scenario. Older people also took much longer initially to learn routes.

The older we are, the more we tend to look on the bright side of life

While our thinking might become less adaptable, researchers have found upsides to ageing. A 2018 review by Laura Carstensen and Marguerite DeLiema at Stanford University collated many findings that suggest that as people get older, they are more drawn to positive information. It is now understood, though, that what we are probably seeing is a fading of what is known as negativity bias as we age.

Younger people – even infants and children – tend to be drawn to negative information, which is thought to serve us well as we explore, figure out and make our own way in the world. Negativity bias helps to alert us to threats so we can avoid or confront them. Preferring positive information – known as the positivity effect – tends to occur in middle to late adulthood.

This effect has been observed in experiments in many different important contexts including attention to emotional faces, recall of facial expressions, memory for health information, focusing more on positive than negative old age stereotypes, and how socially ambiguous situations might be interpreted. Overall, it can affect our attention, short-term memory, autobiographical memory and working memory.

While the studies above were often lab-based hypothetical situations, a new study by Daisy Burr and Gregory Samanez-Larkin and colleagues measured the presence of the positivity effect in real life. The research team messaged 122 participants aged from 20 to 80 years old for 10 days, three times a day – in the morning, afternoon and evening – but at random times. Each message asked how they were feeling at that moment.

Participants were asked to what degree they were feeling each of eight different emotions: happy, relaxed, enthusiastic, sad, sluggish, fearful, quiet or surprised. Older adults experienced lower levels of negative emotions and more intense positive emotions. They also experienced fewer volatile emotions, being more emotionally stable during the day.

Scientists have put forward a number of hypotheses to explain this effect, but the most plausible explanation says that as we age, our motivations alter from the striving, exploration and learning motivated goals of our youth to a motivation to savour life, and find emotional meaning and satisfaction as our years draw to a close.

Known in science as the socioemotional selectivity theory, researchers have also found that what drives this effect are our perceptions of time horizons. When we are young, life stretches far ahead of us, but as we grow older time horizons shrink and, as a result, our goals focus on those realised today and in the immediate future.

Implications

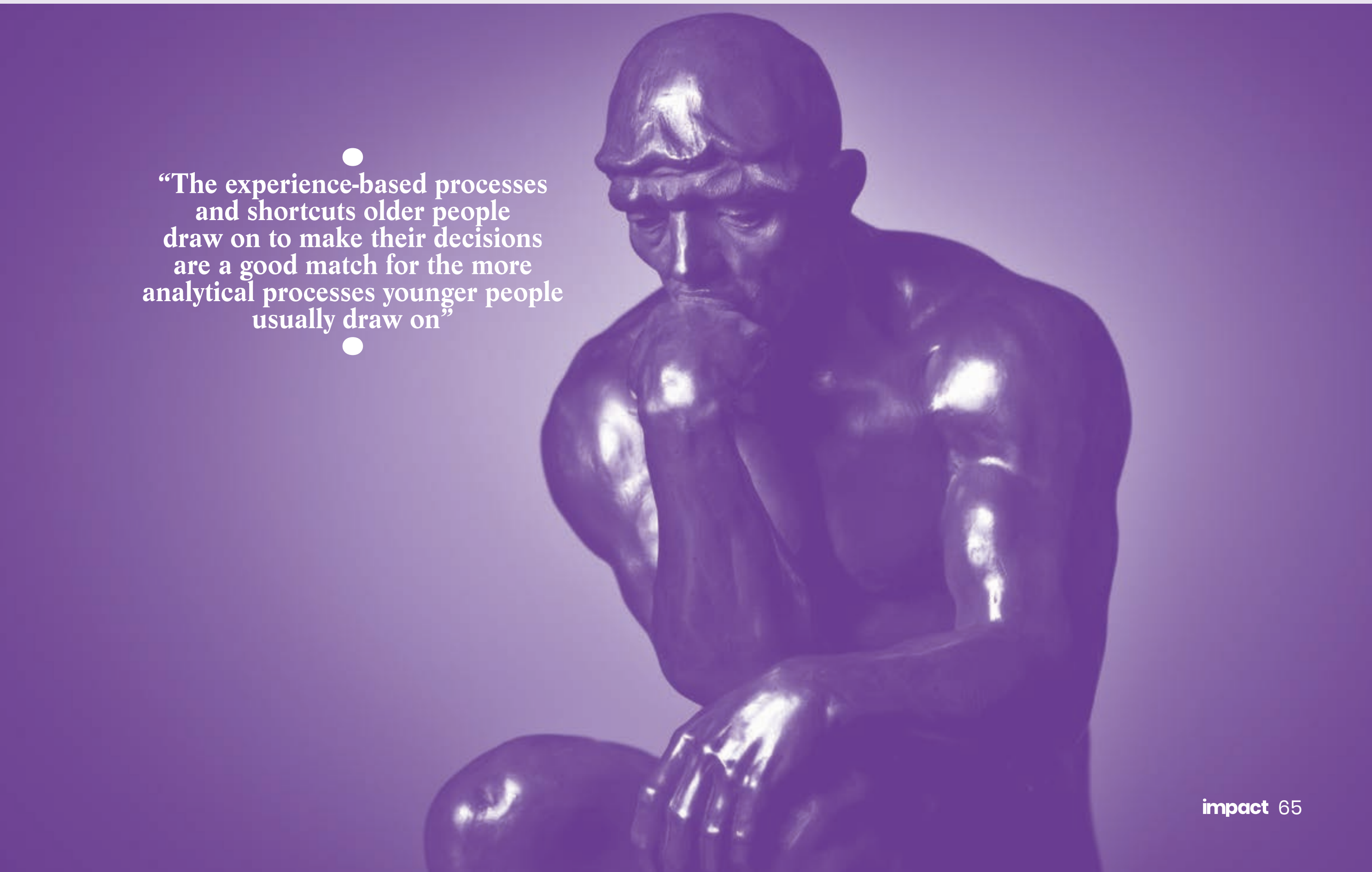
- There are powerful implications for how we frame information; that is, if we want to get the attention of older people, we might be more effective if we present them with positive information and positive stimuli. Conversely, to get the attention of young adults, we might do better with negative stimuli

- When researching, wipe your mind of any pre-formed stereotypes. The vast wealth of research says that the older we get the more emotionally stable we are, and the more drawn we are to the brighter side of life

- If older people do tend to have a more positive outlook, or indeed look at things through rose-tinted spectacles, researchers will also need to be aware of this bias – particularly when asking questions retrospectively

- When conducting research on younger generations, it is equally important to be aware of a slight negativity bias and volatility of emotion among this age group

- Finally, if older people struggle more with complex decision-making, we need to make provisions for that, trying to find ways to make a decision simpler and easy, or perhaps designing the decision-making process so that they can easily fall back on tried and tested experience.



Speak up

There are three essentials of a good presentation – making a connection, having a message that supports change, and delivering with confidence, says Lyn Roseaman

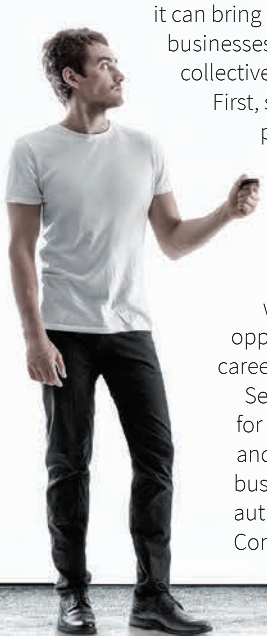
Now, more than ever, being able to speak and present with impact is an essential life skill – it's high on employers' wish lists; you need it for meetings, networking, pitches and presentations, conference talks and keynotes. Speaking benefits far outweigh the costs, yet many of us turn down these opportunities rather than face the challenge.

Why speaking is a good idea

Even before the advent of social media, speaking at conferences was part of my strategy for developing the leisure, travel and tourism business area at Mori – and it worked, communicating expertise to large numbers of potential clients in the UK and overseas. The resulting papers provided PR material, and raised my personal and research credentials as a sector specialist.

It's no coincidence that the research industry now has, for example, AQR Young Disruptors, MRS's &more and new speaker tracks at IIeX.

New research among speakers in *Now You're Talking! Take your speeches, talks and presentations to a wider audience and a bigger stage* sheds light on how we lose out when we shy away from speaking, and the opportunities it can bring to us as individuals, to our businesses, and in terms of our collective research knowledge.



First, speaking at events raises your personal profile – especially on social media – and showcases who you are and your ideas. It helps build your confidence, influence and reputation which, in turn, attracts opportunities and helps your career.

Second, speaking is also good for your organisation's credibility and presence, and can bring new business derived from your authority as a speaker of value. Connecting with people who have listened to your conference talk is a less intimidating and warmer approach to new business relationships than a commercial pitch or networking.

Third, speaking strengthens our collective thinking and knowledge. Nowadays, we all have a voice, and a channel for sharing our thoughts and opinions, though very little is new and it is often poorly curated. As speakers, we have a responsibility to deliver quality material of value to an audience that also drives forward ideas and thinking.

Being a good speaker is a real asset. But what makes a good speech and how can you build your own personal toolkit for giving one?

The *Now You're Talking* speaker survey revealed three essentials – connection, a message that drives change, and confidence: the 3Cs.

Connection

If you can't connect with your audience, you might as well be talking to yourself. Connection is not only about being likable – the smile, good eye contact, friendly conversational style – but also about being relevant and, with today's notoriously short attention spans, you need to gain your audience's attention and interest fast.

Picture yourself sitting in an audience. You've set aside the time, maybe even spent money to be there. You're wondering "what's in it for me?". As a speaker, it's your job to answer that question. To do that, you need to 'deep research' your audience. It's not just about their name and job title. Depending on whether you're talking to a larger, conference-style audience or debriefing a project team, key questions might cover the goals of the event, other speakers, audience profile, what they do/know/expect, how they talk and what they most want from you.

The more you know about your audience, the stronger you'll be able to connect with them and influence their thinking and behaviour on *their* terms.

And it's not just about the content of your speech. Knowing your audience will also give you strong pointers about delivery – whether or not you need slides and how many, relevant stories, appropriate levels of energy, vocal variety, body language and so on.

A message that drives change

Speaking is a privilege, an opportunity to share your knowledge in a way that positively impacts others. There is no point in speaking if you are only going to tell people what they already know. Having researched your audience, you will have a good idea of what they'll value.

All too often, we confuse audiences because we grab our data and start making slides without even thinking about our message and its value to our listeners.

Instead, try starting at the end. What do you want your audience to think, feel or do differently after they've heard your talk or presentation? What is the single most important message you need them to take away? Jot it down in large letters in fewer than 10 words and keep it visible. Any content you try to include that doesn't support your message doesn't belong in this particular talk or presentation.

"Confident speakers are frequent speakers, so take every opportunity to speak up"

Confidence

Confidence matters because it is part of your authority and credibility as a speaker. If you don't feel confident in what you have to say, then why should your audience? When audiences sense your fear, they will often be more concerned about your wellbeing than about what you're saying. Confidence allows your listeners to relax and engage with what you have to say.

Confident speakers are frequent speakers, so take every opportunity to speak up, be it to a small group of colleagues, in a meeting, on the phone, in a pitch or presentation. Get comfortable with speaking and use the opportunity to practise different techniques – voice projection, storytelling, opening a speech with impact. Invite people to give you specific feedback on what they liked and anything that would have improved their experience.

Building your speaker's treasure trove

Your biggest ally as a speaker is you – your authentic self, your personal stories and experiences, your ideas, style of speaking, and gestures and facial expressions. They are all uniquely yours, and can help you express your vision in a way that is fresh and stands out. Here are some tips for building your treasure trove of ideas and techniques:

- Keep a special place where you capture your ideas for speeches – phone, electronic notes, recorder. The important thing is to capture the thought, because otherwise it will get lost in the bustle of your day.
- Keep abreast of reliable sources of ideas, including Blinkist, quality publications, industry journals and TED Talks. These may also give you some useful statistics or quotes for an attention-grabbing opening to a speech or talk.
- Be aware of how you normally speak. Your tone of voice, speaking speed and volume will change to reflect different words and emotions. These will form the basis of your vocal styling in front of an audience.
- Similarly, be mindful of your natural facial expressions, hand gestures and posture. They speak the truth. In the case where your non-verbal language and your words are incongruent, it's the non-verbal communication people will believe.
- Take note of the things you say that make people laugh. For most of us, this gentle, personal and often self-deprecating humour is far more powerful than stand-up-style jokes.
- Practise different aspects of speaking at every opportunity.

Whether you're an experienced researcher or at the beginning of your career, public speaking is a very good idea for you, your business and the industry's collective knowledge. Embrace the 3Cs and finesse how you take your ideas to a bigger stage.

Lyn Roseaman is founder of coaching business Now You're Talking

Take four

Could four days become the standard working week? With evidence mounting, one agency shares the results of a shorter week for them

At the start of this year, there was a flurry of excitement when media outlets around Europe reported that the Finnish prime minister, Sanna Marin, was planning to introduce a four-day working week policy. The story turned out to be a lesson in how false information can spread – Marin had merely floated the idea during a panel before she even became prime minister.

However, the working population is increasingly drawn to more flexible approaches, and economic arguments for a longer weekend have been gathering steam for a few years.

New Zealand trust management company Perpetual Guardian implemented a four-day week for its 240 employees after successfully trialling it in 2018, and Microsoft trialled it with its 2,500 employees in Japan, finding that productivity increased by 40% after a month. In Spain's Valencia, the regional government has commissioned economists to draw up a strategy to move to the model without paying workers less.

The shorter working week is also favoured by the public, as long as it doesn't negatively impact the economy – 63% of Brits support the idea, according to YouGov's Eurotrack (March 2019).

But what is the reality of implementing a four-day week for businesses? We asked Tash Walker, founder of research agency The Mix London, to reflect on the impact of shortening the working week.

I set up The Mix in 2012, as an agency focused on understanding human behaviour. Three years ago, we were encountering the same kind of problem with every person we spoke to in our research projects for clients – a feeling of being stressed and too busy to do all the things you want, or spend time with the people you want. Technology has made this worse. A dizzying array of email, social media and an expectation to always be available mean our brains feel overwhelmed.

At the same time, my business partner and I were having debates about how to work. Our email seemed to be threatening to overwhelm us, and relentless video meetings and travel meant time to think was limited. My husband once jokingly said he had developed a great relationship with my forehead – it was all he could see in the evenings, visible above the luminous glow of my laptop. Behind every joke is an element of truth, however.

"We had to reassure people that they would still be paid the same and that we weren't expecting five days of work in four"

The joy of running your own business is that you get to decide how to do things and, in 2016, we embarked on some research into other working practices. How did other people do it?

Some companies had half days on Fridays, some gave their team Wednesday afternoons for doing sport, and others had a broad 'flexible' approach. But none seemed to fundamentally challenge their working practices. What we were looking for was an overhaul in our relationship with work, not just tinkering at the edges.

In Scandinavia, we found multiple companies that had trialled four-day weeks, and most seemed to have had really positive experiences.

From the minute we read about it, it seemed like the only option – radical enough to force us to change our behaviour. Working in research, you become uniquely accustomed to the challenges of behaviour change, so we knew it would have to be pretty innovative to succeed.

The next step was to trial it. The team's response was more muted than I had anticipated – I wrongly assumed that people

“We were looking for an **overhaul in our relationship** with work”

would be whooping from the rooftops. Any change can be difficult. Even if it looks great from the outside, we realised that people were worried, so we had to reassure them that they would still be paid the same, there would still be chances for development and growth, and that we weren’t expecting five days of work in four.

We embarked on a live trial for three months without telling clients because, in all honesty, we didn’t know if it would work. I was worried about workload, being available enough, and maintaining growth.

During the trial, we met once a week as a full team to talk about processes and different ways of working. During these sessions, we leaned heavily on two sources of business-structure innovation:

- Making Toast, a design-thinking exercise developed by Tom Wujec to assess process problems and help you come up with more efficient systems
- Ideo resources, which we used to help us design team structures that worked for four-day weeks.

We created a WhatsApp team channel for emergencies – any messaging service would do just as good a job.

Instead of working in silos and handing projects over to other areas, teams from different disciplines now all work on delivering projects as a collective. It means our ideas come from more diverse places within the team and so are more unexpected – and, generally, more creative and valuable.

In hindsight, I don’t know what I thought we would do if it didn’t work out. How could you give that to the team and then say: “Actually guys, back to five days”? But trial it we did.

The result? Not a single client noticed. We weren’t as important as we thought we were. The systems we put in place meant clients had been totally unaware we weren’t around.

The trial became our normal practice and we began to communicate this to our clients, with their fantastic support. Clients hold us to account – they tell us not to reply, and do their very best to make sure we don’t need to be there on Fridays.

In the three-month trial, we worked out a few simple systems to help us:

- We all have the same day off – Fridays
- People check their email once in the morning and in the afternoon to avoid emergencies (it’s research: no-one is usually dying)
- We try to flag early if there is a need for us to deliver on a Friday – this has happened about 10 times in the past two years
- We tell clients upfront when we are pitching, so they know we don’t work on Fridays.

As a growing business, we need to constantly adapt our approach to make sure it is still relevant, but the results are clear. Since 2016, when we started the process, our revenue has increased by 70%, and sick days over the same period have decreased by 75%. Margin has also increased by a significant amount, productivity has improved, and we have been able to attract people to work for us that otherwise may not have done.

Doing a four-day week doesn’t make you money, but it certainly isn’t anti-commercial. It is not purely about the soft benefits, although these are clearly evident. Our client relationships have strengthened. People are curious about it and want to talk to us about how we do things.

My reflections on this process are that, if you are up for a new way of working, you need to recognise the challenge of changing your behaviour. It is hard to do, and the same approach won’t fit every business – but once you make a clear choice, the need for finding new ways of doing things leads to innovation.

For us, this has led to some of the best work we have ever done.

Protecting the vulnerable

In January 2016, MRS produced a best-practice guide and checklist to help practitioners identify, understand and respond to research-participant vulnerabilities effectively and consistently.

Since the Data Protection Act 2018 was introduced – which emphasises showing accountability throughout the data-collection process – a new section on vulnerable people has been added to the 2019 Code of Conduct. This will help ensure the needs of vulnerable participants are considered in developing products and services, policy-making and regulatory supervision and enforcement.

Best ethical practice is reinforced by new code rules covering vulnerable people, underlining the importance of our members' professional activities being widely accessible:

Rule 23. Members must take reasonable steps to assess, identify and consider the particular needs of vulnerable people involved in their professional activities.

Rule 24. When working with vulnerable people, members must ensure that such individuals are capable of making informed decisions and are not unfairly pressured to cooperate with a request to participate, and that they are given an opportunity to decline to take part.

These rules require members to make every reasonable effort to ensure that their professional activities do not cause harm – either to those who have participated directly or, more broadly, to anyone affected by it. This includes members taking reasonable action to ensure that others do not breach or cause a breach of the code.

Vulnerability can affect anyone

Participant vulnerability is a complex, dynamic state that can affect anyone at any time, for many different reasons. All participants are different, with a wide range of needs, abilities and personal circumstances.

Some people's ability to participate effectively in the research may be affected by certain individual characteristics. These can be short-term or long-term, might fluctuate over time, and may not be obvious. Participants may be vulnerable because their competence to give informed consent is uncertain; because, socially, they are in a position where it is difficult for them to give informed consent; or their circumstances may affect their decision to consent. Additionally, being involved in the research project can increase participants' potential vulnerability.

It is also important to recognise that not all the risk factors will be relevant all of the time, and the important point is to manage the relevant risks rather than seek to avoid risks involved in researching individuals or populations in vulnerable positions.

Permanent vulnerabilities

Permanent or long-term characteristics could include: people who have learning disabilities or other permanent or long-term disabilities; those on a low income; people with low literacy levels; or communities that have cultural barriers to participation. These characteristics can affect large numbers of people.

Fluctuating vulnerabilities

People can be made vulnerable by transitory situations that are not necessarily obvious at first glance. Fluctuating characteristics might include: mental health issues; English not being a first language; health problems; location; or lack of internet access.

Short-term vulnerabilities

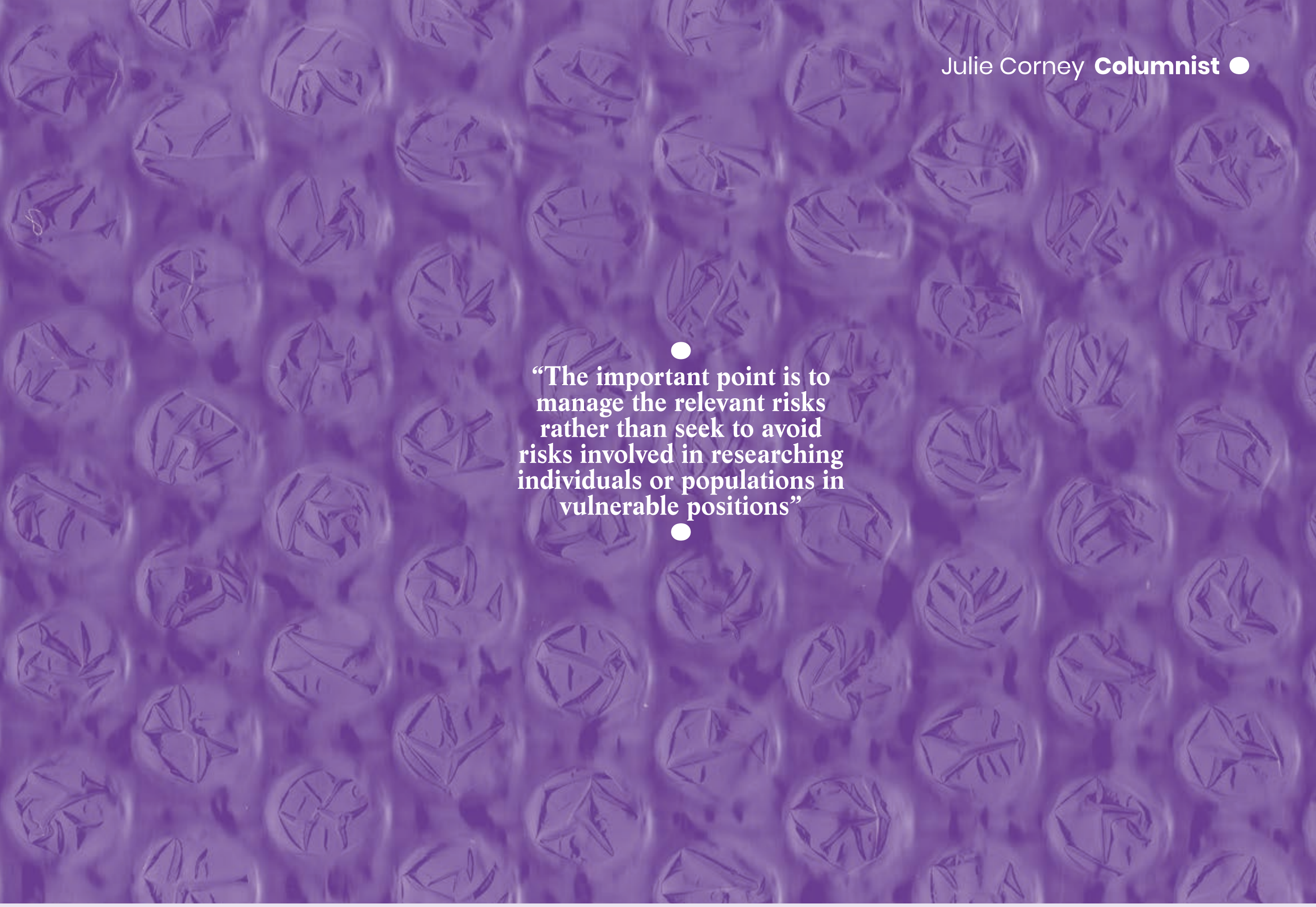
Short-term characteristics causing vulnerability could be factors related to sudden changes in circumstances, such as loss of employment or income, bereavement, relationship breakdown, or caring responsibilities.

Methodologies matter

The impact of vulnerability on the data-collection exercise will also vary according to the type of methodology used in the project, for example:

Telephone

Some participants find it difficult to differentiate between genuine research calls and selling under the guise of research (sugging), fundraising under the guise of research (frugging), or personal protection insurance (PPI). Members must realise that calling a telephone number after a firm refusal has been given is



> "The important point is to manage the relevant risks rather than seek to avoid risks involved in researching individuals or populations in vulnerable positions"

in breach of the MRS Code, as it is likely to cause harm, adverse effects and damage the reputation of the sector. This is why MRS requires its members to maintain 'do not call' lists to avoid harassment of individuals.

One-to-one interviews

Many participants – particularly the elderly or less mobile – are understandably wary about inviting interviewers into their home. This also applies to the safety of interviewers and researchers when this methodology is used. As such, practitioners must be trained in how to alleviate a threatening situation.

Group interviews

Care should be taken to ensure all participants can contribute to group discussions and are not bullied, intimidated or belittled. Participants must be told what will be expected of them when they agree to participate. This includes any physical exercise or anything unusual that may be required.

Recognising vulnerability

To recognise a vulnerable person and their needs, practitioners developing proposals and collecting data should consider if members of the research team know how to recognise vulnerability and deal with vulnerable participants. This includes how to react if any abuse or serious crime is revealed during the data-collection process. The research team should receive specific training ahead of the project and be periodically assessed on their understanding of any guidance.

If the topic of the data collection is sensitive – and it is known, or likely, that some or all of the participants are potentially vulnerable – ensure that support materials and helpline numbers are available for participants. It may be helpful to contact a relevant support group or charity for their advice on specific areas before starting the project, to help identify any potential issues.

Back to data protection

To ensure transparency, the Data Protection Act 2018 requires individuals to be informed about the collection and use of their personal data; this is commonly contained within a privacy notice. The information given in the notice must be concise, transparent, intelligible, easily accessible, and it must use clear and plain language.

Think about the intended audience for the privacy information and put yourself in their position. It is particularly important to ensure that the privacy notice – and the wording used to seek permission to take part in a project – is tailored for the participants involved. Using language that is clear and easy to understand helps inclusion and encourages people to take part in data-collection projects, now and in the future.

Open all hours – the best research content on the web

For those of you lucky enough to attend Impact 2020, you'll know we spoke a lot about how uncertainty is affecting business and society. The internet is both the enabler and the disrupter. Information disseminates in often unpredictable patterns and at lightning speed. The word 'viral' is seen as an opportunity to influence, as well as having more sinister real-world associations.

Managing and using the internet and information for good are among the key challenges of our age, and the meta theme behind many of the conversations at conference. Committing anything to print weeks before publication is often a risk, but I'm confident there will be a lot more home-based working by the time you read this, and I'm anticipating that online materials will be all the more welcome.

As a result, MRS is making great efforts to share our wonderful archive of videos from Impact conferences, member evenings and training events, and topical industry interviews. Add to that podcasts and special reports, professional webinars, daily news, opinion and features from across our family of websites.

All of this content is free to members, and we are making extra efforts to curate and highlight themes to help you decide what's of particular interest to you. Now, more than ever, we need to be looking around for as broad a set of perspectives as possible, and you'll get that from our content archive – from Booker prize winners and politicians to cybersecurity experts and environmental visionaries, as well as deep dives into the latest methods in behavioural economics, semiotics and machine learning.

Our joint report with Savanta *Intelligence Capital 2020: A practitioner's guide* provides a framework for clients and agencies to build capacity, and make the connection between insight and business growth. *Intelligence Capital* can meet the demands we all face from increasing uncertainty and market fragmentation. Read this report – at **mrs.org.uk/ic2020** – and let me know what you think, especially if there are areas within the framework where MRS can do more to support you.

As researchers, we learn and develop skills and perspectives at every opportunity. I urge the entire sector to consider this moment as just such an opportunity, and to use these materials in a collective effort of professional development, in spite of the difficult circumstances in which we find ourselves.

Sector and MRS news

Standards webinars

MRS has launched a new webinar series for 2020 to provide updates on professional policy and standards. Compiled and presented by the MRS standards and policy team, these quarterly webinars bring you closer to the experts behind Codeline, MRS' email advice service for information on the Code of Conduct, GDPR, regulations and guidelines. You'll also have the chance to submit questions to the MRS experts during the webinar, about any of the topics covered, or any other burning issues you may have. The next webinar is in May. Visit mrs.org.uk/events

EFAMRO Monitoring Report

The regular EFAMRO Monitoring Report covers selected legal and regulatory developments and events in data protection of particular interest to the research sector. Visit mrs.org.uk/EFAMRO

Making the most of your membership

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

Video library

Get inspired and learn with an extensive video library

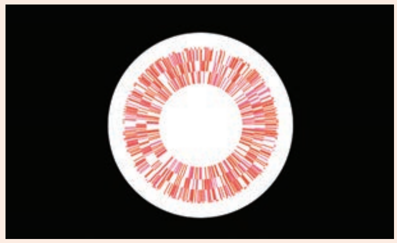
Our members enjoy access to a wide range of free video content including face-to-face interviews with industry leaders, as well as inspiring keynote speeches from a range of MRS conferences. Brush up on your knowledge by tuning in to hear Carl Miller from Demos talk about the dark side of the internet, find out how Rev Richard Coles is ‘promiscuously nosey’, and learn about the world’s strangest brain disorders from Helen Thomson.

Awards case studies

See the winning submissions for award applications

Every year, winners and finalists from the MRS Awards reveal how they have used research in successful projects, by sharing their winning case studies. Members get exclusive access to the award submissions from finalists and winners. These provide invaluable learning and the opportunity to understand how a winning entry is structured – a useful template if you are considering entering your organisation into the 2020 awards.

Research Buyers Guide



The guide of accredited research organisations

The Research Buyers Guide (RBG) is the only source of accredited market and social research organisations in the UK and Ireland. All featured suppliers must employ at least one MRS Member in their insight, research or analytics teams, to ensure that research is conducted to the high standards laid out in the MRS Code of Conduct. RBG is the definitive guide for clients looking to engage high-quality research suppliers.

Access your benefits

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

www.mrs.org.uk/membership/benefits

Diary dates

Speaker evenings

Lived experience: a case study on mental health

Understand how a deliberative engagement workshop brought together the lived experiences of people with mental health issues to inform Mind's leadership team.
14 May

The emotional power of advertising

With the best ads resonating with people on an emotional rather than a mind level, Sign Salad and Tapestry Research reveal how to measure both the emotive and cognitive power of an ad.
18 June

Conferences

FMCG Research Summit

Join brands, retailers and agencies to hear how novel research approaches are improving cost, agility and quality of insight generation in FMCG.
7 May

Media and Advertising Summit

From tech to TV, social to private, our media experiences with brands are increasingly complex and bespoke. Hear from the brands, media owners and tech giants on their research approaches.
18 June

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

The Future of B2B Research

Be part of the annual B2B Research conference to keep abreast of the latest trends, research paradigms and innovative methodologies gaining traction in the B2B space.
25 June

Training highlights

Consumer Psychology

Understand consumer motivations and the current thinking in consumer psychology, neuroscience and behavioural economics on this insightful training course.
20 April

Using R in Data Analytics

Get to grips with the analytics tool that can supercharge your quantitative research analysis by learning about the main principles of deploying R.
27 April

One Day MBA

This one-day masterclass delivers a comprehensive overview of organisational success drivers, as well as equipping delegates with a set of effective management tools.
30 April

Advanced Consulting Skills

This effective three-day training course goes beyond great client servicing to reveal the processes and consulting skills that are vital to business success.
4, 11 and 18 May

Semiotics Made Practical

Understand how semiotics can analyse popular culture to reveal the hidden ideas and cues that drive consumer choices and decisions.
13 May

The Code of Conduct

Learn how to use the Code and hear real-life case studies to explore how it operates in practice.
19 May

Survey Sampling

Designed for researchers working on surveys to better understand effective sampling methods and ensure the statistical validity of survey findings.
12 June

Strategic Management

This practical course provides managers with a clear, strategic framework to carry out their management role effectively.
22 June

Online delivery: **During the Covid-19 outbreak, some of our courses will be delivered online. Please contact** training@mrs.org.uk **for more information.**

7

Liz Nelson founded and chaired Taylor Nelson Sofrès from 1965 until 1992. She has held several prominent positions, including chairman of the Marketing Group of Great Britain. She is also founding patron of the Archive of Market and Social Research. The MRS launched the Liz Nelson Social Impact Award in 2019

1 What's been the biggest change for women in the industry since you started your career?

I never found any anti-female attitudes from the day I went into market research at Mars. I don't know why; it could be that interviewers were all women or, more likely, that – during the war – market research was done by government departments and they were female statisticians.

2 What was the main challenge you faced in the beginning?

Dealing with banks – we needed capital to start. The people who helped us most were Clarks shoes. I was doing a lot of research for them and they just switched to paying the new firm rather than the old firm. The banks were tricky; they asked a lot of questions. They hadn't a clue about market research. There was an ignorance of the whole profession, and that's changed.

3 What's your view on the influx of private equity into market research?

I think the private equity business is totally wrong. Companies should be owned by employees; such companies have the longest-serving employees and are probably the happiest firms. In the earlier decades, who you dealt with and the contacts you had inside a company mattered a lot – there was more personal service to individuals in the client companies. Maybe it's a pity that's changed.

4 How can agencies foster that personal touch?

When a new person joins a client company, it would be ideal if they could spend maybe two months in a research company, seeing how data is presented. I had that. I'd been at Mars, which was my initial training, but then to go into an organisation such as Mass Observation – I can't tell you the clash of cultures. Both have a lot to offer, and I would like to see more trainees spend time in research agencies. I think it would be so good for both parties.

5 There is an increasing emphasis on short-term objectives. What's the implication for research in that context?

Well, you can lose a client – and I have – if you push the fact that they should be thinking longer term. Strategic and business planning has got to look at least three years ahead and, tragically, companies in general – not just in research – don't consider various scenarios for different economic situations. Over the next five years there's going to be huge change in market research, and are we ready for that? How many away days are there discussing the future of the company and training your employees to think about how they will have to change?

6 Are there skills from the past that could benefit the business today?

Shell was a wonderful client; you were truly brought into the business strategy of the company, so we were very active in dealing with future scenarios. It was a marvellous opportunity, because all sorts of people contributed to the thinking on how to react to changing circumstances – I wish that happened more. I still worry most about qualitative research. We need very different skills for qual, and are we really recruiting creative types? Because it's just so important – it's where researchers learn to use their intuition. It's sad that, in some ways, data is the all-important thing, not the quality of response.

7 If you could begin your career again, what would you do differently?

Training wouldn't just be about research techniques; it would be on how to develop long-term relationships with clients, and how to deal with long-term data and the massive intelligence that can come from data 30 years ago. There's so much wisdom to be gained from looking at past data. I was very fond of dealing with market research data, but I couldn't say the same about management problems. I wish somebody had made management decisions fascinating to study. Now it happens in business schools, but I wish it had happened in my generation.