impact

ISSUE 30 JULY 2020

Using evidence & insight to make a difference

Resilient response

How organisations can use insight to handle the unexpected and build lasting flexibility

The Research House
A SCHLESINGER COMPANY

COMPREHENSIVE ONLINE SOLUTIONS

- Online Surveys with High API Connectivity to Global Panels
- Online Focus Groups & IDIs
- Online Bulletin Boards
- Online Ethnography
- Online Usability & Eye Tracking

Let's Work Together

Info@Research-House.co.uk • +44 (0) 207 935 4979
Discover Our Advantage at **SchlesingerGroup.com**

MRS Evidence Matters™

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

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

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

Sales manager
Tim Jones
+44 (0) 20 7566 1843
tim.jones@mrs.org.uk

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

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

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

PRINTER
Geoff Neal

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

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

CREDITS
cover istock.com / ExcaliburMedia
P14-17 istock.com / akinbostanci
P20 istock.com / ExcaliburMedia
P21 istock.com / pidjoe
P22 istock.com / wesvandinter
P24 istock.com / wesvandinter
P25 istock.com / ExcaliburMedia
P26 istock.com / ExcaliburMedia
P36 istock.com / alengo
P42 istock.com / bellanatella
P46-47 istock.com / VPanteon
P55 istock.com / GabrielPevide
P57 istock.com / imaginima

What we can influence

If you had asked me in January what plans I had for this summer, editing *Impact* in the midst of a pandemic would not have been one of them.

Yet, here we are. Such is the way in these 'unprecedented times' – a phrase that quickly became rather hackneyed. Perhaps the reason we fall back on such terms is a need for common language during such uncommon circumstances.

It will come as no surprise that, as Covid-19 has defined life for much of the past few months, it features prominently in this issue. It would have been impossible to produce had we ignored the crisis that has impacted lives and businesses so profoundly in such a short period of time. As Lorna Tilbian notes (p41), drawing on the observations of Lenin: "There are decades where nothing happens, and there are weeks where decades happen."

What a decade we are living in. But while uncertainty is the order of 2020, there are some fundamentals we can rely on.

There is strength in connection with others, and working from home can remind you how much you enjoy the presence of colleagues. But great things can still be achieved from our satellite living rooms and home offices. This issue was put together almost entirely remotely, and it looks likely that this period of remote working could have lasting implications (p54), so let's use the resources at our disposal to make work work for us.

Evidence has been central to the pandemic response while organisations scrambled to adapt their business models. As I write this, restrictions are easing, but the road ahead is still unclear. There has never been a greater need for research to inform and influence how decisions are made.

While insight couldn't predict this crisis, it can help businesses ensure they are as resilient as possible (p18), building a strong foundation to respond effectively to future uncertainty.

That foundation is rooted in people, and the next phase will be dependent on the ability to listen, understand and respond to customers, clients and colleagues. This is nothing new – just as the means to hold virtual meetings and buy groceries online existed previously – but the need has become more acute. Listening and deliberation, explored in our feature on citizens' assemblies (p14), will be important for governments, while prosocial interventions (p50) could address some of society's biggest issues.

It would be easy to claim that the world has changed entirely. Not everything has changed forever, but some things will be different – the only way to understand them is to prioritise insight.

If it all seems too much, narrow your focus. Rory Sutherland writes about how seemingly small actions can have broader outcomes (p7). Focusing on something you can positively influence – when so much is out of our control – can not only make us feel calmer, but also lead to change on a scale we may not have anticipated.

Contents

Issue 30
July 2020

18

World view

Spotlight

Impact report

Features

11

Focus

Columnists

WHAT IF WE KNEW YOUR SURROUNDINGS BETTER THAN YOU?

1,500,000 Panelists Worldwide

300 data points through **13 profiling Questionnaires**

CONTACT US

Shelley Barber
s.barber@misgroup.io
+44 20 7684 7852

ONLINE SURVEYS
QUANT SERVICES

SURVEY CREATION

Max diffs, conjoint analysis, complex routing, simple surveys etc.

Fully customizable, no software limitations.

An expert team at your service.

PANELS / ENGAGEMENT

Worldwide Panels
200K UK PANELISTS & 500K FR PANELISTS.

Triple Opt-in, highest quality standards.

Over 300 Data points
through 13 profiling Questionnaires.

MADE IN SURVEYS
by MIS | GROUP

MRS Operations Awards 2019
Finalist
Best Data Collection (online)

From small seed to broad impact

Over the past few years, I have annoyed colleagues with my obsession with several fairly niche areas of human activity. Two of my most tedious hobby-horses have been the reluctance to adopt moist toilet paper and our glacially slow progress (until now) in adopting video-conferencing.

There is a method to the madness. Quite simply, I see these anomalies as a kind of Fermat's last theorem of human behaviour – a puzzle to be solved not only because it's challenging in itself, but because it may cast light on many other problems.

One of the mantras of Ogilvy's behavioural science practice is 'dare to be trivial'. In this we are influenced by complexity theory – you should never be afraid to suggest a tiny or seemingly oblique intervention, as they can have huge overall effects. There is another reason, too. Human behaviour doesn't follow rules, but it does exhibit recurring patterns. Hence, patterns encountered in the purchase of Cadbury's Creme Eggs might provide a template by which you could encourage the adoption of solar panels.

So, why did the magical possibility of remote meetings receive a lukewarm reception from businesses? Nobody is suggesting that all business travel is redundant – merely that some asymmetries might have been present that biased our behaviour against virtual meetings and, with it, more flexible working.

What might these asymmetries have been? The following theoretical list is not exhaustive:

1 A threshold problem. The benefits of video-calling only become apparent above a certain level of use. If you still have to commute to work and then find a meeting room in which to make your video call, you might as well go the whole hog and stage a meeting.

2 A habituation problem. Unless you use the technology fairly frequently, video-calling is cognitively difficult. This is akin to online grocery shopping, where the first use is inordinately more tiresome than the tenth.

3 A signalling problem. Because it is easier to work from home, and it is painful to get up at 5am to meet a client in Frankfurt, we are biased in favour of adopting the more costly and difficult option to signal our commitment to our employer or client. We see remote working as a concession, not a choice, so we are reluctant to take advantage of it, as we feel we are burning reputational capital every time we do so.

"We favour adopting the more costly and difficult option to signal our commitment to our employer or client"

4 A 'minority rule' problem. If one person prefers a physical meeting to a virtual one, he or she can effectively prevent it from happening, regardless of the group's overall preferences. Note that it is much more common for extroverts to bully introverts than the other way around.

5 A 'defensive decision-making' problem. As a physical meeting is the default, there is no risk of blame – whereas, if you suggest a video-conference and it turns out badly, your neck is on the line.

Now we have a list of possibilities: either we find out which of these 'biases' is most significant and set about tackling it first (the 'real why'), or we can try to invent a behavioural intervention that might overcome many or all of these biases simultaneously (the 'universal what'). To use a medical analogy, you either find that the patient's blood-group is A+ and administer A+ blood, or you administer O-, which will work regardless.

With my team, I discovered that merely permitting people to work remotely was not enough – they tended to see it as a privilege to be held in reserve. So, last year, I instigated Zoom Fridays. I worked from home and everyone else was encouraged to do the same. On one day a week, the prevailing defaults were reversed. People began to see beyond their asymmetric perceptual assumptions. From this small seed, after a few months, our video-calling grew from Mondays to Thursdays, too. We still met, of course, but the ratio of physical meetings to virtual was now closer to 50:50 than to 95:5.

There are many other examples where a targeted intervention has been shown to change behaviour more widely. Luca Dellanna performed an experiment that showed that a brief, fanatical focus on cleanliness in one small part of a factory floor led to a lasting improvement in cleanliness throughout.

Here we have a pattern. Brief, focused interventions can lead to lasting, self-reinforcing broadscale outcomes.

Do the biases outlined here also apply to the adoption of greener behaviours, or to the recruitment and promotion of BAME employees? What if Ogilvy instigated a two-year period during which it only recruited BAME staff? Would the ripple effects exceed the direct effects, in both scale and duration? There's only one way to find out.

World view

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

"The way to make sure progress in gender equality isn't lost to the pandemic is by putting girls at the centre of building the solutions, so girls are active participants and their voices are heard."

(p11)

Sales of board games in the UK increased by 240% year on year during March

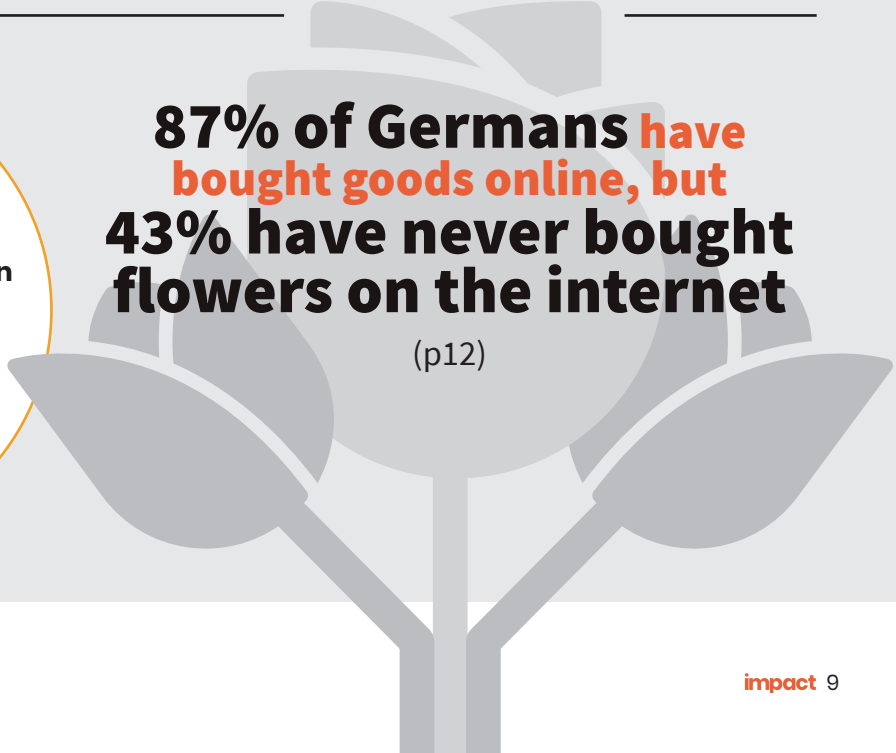
(p10)

"Nostalgia takes us back to a time when we were cared for and looked after, and it contains lessons on how to cope, survive and even thrive."

(p10)

"Consumers in Russia and France will want to hear clear messages that there is a plan in place, whereas Chinese people and Brits may be more open to messages about opportunity."

(p13)



87% of Germans have bought goods online, but 43% have never bought flowers on the internet

(p12)

Return to childhood

The Covid-19 lockdown led to an increase in board game purchases, and it was classic games that dominated sales. Did the pandemic lead people to revert to simpler pastimes? By Liam Kay

Whether it be a divisive Monopoly game at Christmas, Cluedo with the family on a quiet weekend or card games with friends, many of us have positive memories of playing traditional games.

During the recent Covid-19 lockdowns, with people restricted to their homes for weeks on end, board games had a moment. Sales in the UK increased by 240% in the week ending 21 March, compared with the same week in 2019, according to figures from the NPD Group.

Additionally, Kantar's Covid-19 barometer study from the first week of April recorded a 34% increase in US respondents playing board and card games with their families since lockdown began.

NPD is tracking 14 countries – the US, UK, Canada, France, Italy, China, Germany, Spain, the Netherlands, Belgium, Russia, Brazil, Mexico and Australia – and similar trends are being seen across the globe, albeit at higher rates in some countries than others.

The answer for the increase in sales is as much about nostalgia as a need to pass the time in lockdown, according to Frédérique Tutt, global toy market analyst at the NPD Group. With families trapped together for weeks, many returned to the games they played in their youth.

She says: "During the lockdown, people wanted to keep themselves busy, or keep their children busy as they cannot go to school. They wanted to find a way to connect, or reconnect, around the sitting room or dining room table to bring generations together. Games are a particularly good way to do that."

However, consumers are not looking at the latest games for their children, Tutt says. The top 10 biggest-selling games are all older, 'classic' games, such as Monopoly, rather than newer, trendier alternatives. "What's different is people have reverted to the original classic they knew, and they used to play when they were children themselves," she explains.

At the moment, much of the appeal of board games, as well as simple pastimes such as baking, is their ability to offer some certainty in an uncertain time, according to Matilda Andersson, managing director, London and Amsterdam, at Crowd DNA. "Nostalgic pastimes and activities not only provide a feeling of stability amid the uncertainty, but offer small moments of unadulterated joy," she says.

"This is because they are rooted in innocence, familiarity, and sweetness. Often, we first experienced them during childhood when life was simple and there was no responsibility. Nostalgia takes us back to a time when we were cared for and looked after, and it contains lessons on how to cope, survive and even thrive."

Tutt says the fact that people are shopping online has also affected the move towards classic brands.

"People are buying games online, and online does not facilitate the discovery of new products," she argues. "That is something that retailers and manufacturers alike should think about for after the lockdown – how can you promote discovery? How can you promote your new toy or game?"

Tutt expects the growth of board games – and classic ones at that – to continue. She doesn't think recent spikes in sales have simply cannibalised the expected rise in Christmas purchases. Instead, it has brought in new players – or perhaps reawakened an old love for a classic game.

"After this period, I think we will have recruited new gamers and adults and kids who like to play together," Tutt says. "When it comes to the peak of the market at Christmas time, they will want to go back to that category, remembering the fun they had playing together and wanting to replicate that."

Lockdown pastimes

- Baking: 40% of UK consumers claimed to do more baking at home during lockdown (Kantar LinkQ survey of 1,411 respondents, 20–22 April 2020)
- Crafts: there was a 60% increase in visits to crafts chain Hobbycraft's website in the six weeks to 4 May (Hobbycraft figures)
- Home improvements: 32% of Britons used DIY to help them cope during lockdown (Office for National Statistics, opinions and lifestyle survey, 17–27 April)

Hearing girls' voices

Girl Effect's Lucy Powell **reflects on the challenges of conducting research with girls during the pandemic**

Girl Effect works to support adolescent girls in low- and middle-income countries to make choices so they are healthier, more educated and financially secure. Designed to ensure that girls' voices are actively influencing the programmes that affect them, Technology Enabled Girl Ambassadors (TEGA) is Girl Effect's female-operated digital research tool, allowing girls to collect real-time insights into the lives of their peers.

Young women, aged 18-24, are trained using a bespoke mobile app and, through a partnership with the MRS, become qualified digital researchers – TEGAs. We have been working with the MRS since 2016 to provide TEGAs with the MRS Certificate in Digital Interviewing Skills, awarded at the end of the training process.

TEGA faces perhaps its biggest challenge to date with Covid-19. It is, traditionally, a face-to-face methodology, but given that this type of fieldwork is not currently possible, we have had to evolve to ensure that we are still meeting all research needs while remaining true to the methodology. Our teams are working creatively to come up with a safe, scalable solution, and are exploring options for using technology to allow the TEGAs to conduct research remotely through their TEGA app.

As well as the challenges presented by Covid-19, we have seen an opportunity to amplify girls' voices during this time. We believe that the way to make sure progress in gender equality isn't lost to the pandemic is by putting girls at the centre of building the solutions, so they are active participants and their voices are heard.

At a time when access to real-time, honest insights from girls is even more valuable, we launched Hear Her Voice: a storytelling research project in which the TEGAs turn the camera on themselves, using video diaries while traditional TEGA fieldwork is not possible.

The project has uncovered data on the impact of the pandemic on girls in Bangladesh, India, Malawi, Nigeria and the US. TEGAs are sharing their experiences of life under lockdown and the impact Covid-19 is having on their lives, to bring girls' voices into the conversation and allow organisations to design programmes informed by their insights.

Topics covered include education, pastimes, girls' hopes and fears, health and nutrition, and myths and stigma. In each location, these themes present themselves in different ways, with some unifying issues.

In Malawi, for example, there is some debate over whether Covid-19 has reached the country at all. In India, lack of access to sanitary products has led to TEGAs having to use cloths. In the US, struggles with mental health have been at the forefront of the girls' stories.

A concern voiced by most TEGAs, regardless of location, is over their education; they fear what losing this time may mean for their futures – a worry exacerbated by digital inequality for those unable to access e-learning materials.

In addition to the Hear Her Voice project, our newest network of 28 TEGAs in North East Nigeria have recently received their MRS certificates – a great achievement, given the challenges not just with Covid-19, but with ongoing instability in this region. Standard practices around training and fieldwork were disrupted because of safety concerns, so parts of the in-person training were not possible. By adapting the programme, our team was able to pilot digital training methods to ensure the TEGAs graduated on time.

At a time when girls' lives across the world are likely to be impacted in major and, in many cases devastating, ways, it's more important than ever to listen to their voices.

Despite the extraordinary global situation in which we find ourselves, we are continuing to shine a light on the lives of girls, providing them with a platform to tell their stories to the world.

Lucy Powell is director of TEGA at Girl Effect

Taking root

Research prompted a change in how online flower company Bloom & Wild spoke to consumers in Germany and France.
By Liam Kay

Whether it is for a special occasion or simply to brighten up a socially isolated household, people love receiving flowers – and, increasingly, they can be ordered online.

Bloom & Wild specialises in home flower deliveries and many of its products can be posted through standard UK letterboxes, meaning nobody has to sign for delivery. Seven years after launch, the UK start-up has expanded to Ireland, Germany and France, with the latter two countries providing a cultural challenge for its delivery model.

Unlike in the UK, letterboxes are not commonplace in France or Germany. Although Bloom & Wild also sells hand-tied flower arrangements, it has been a challenge to adapt its business model to be a viable alternative to traditional flower shops on the continent.

Insights have helped to shape the company's response. Bloom & Wild worked with consumer research firm Attest to look at how to handle its international expansion and understand how the brand performs against competitors. It carried out a survey, with analysis via Attest's research platform.

Mairead Masterson, head of business intelligence at Bloom & Wild, says the initial aim of the research was to understand national preferences for flower delivery in France and Germany so that the company could inform its marketing communications accordingly.

"In those markets, in particular, we were interested in the opinions of our target consumers – whether they preferred hand-ties versus our letterbox packaging format," she says. "We wanted to dig into preferences for packaging and bouquet design, and how they varied between markets, so we could refine the messages we pushed in those areas."

Bloom & Wild's work on the project involved surveying 1,000 people, via Attest, in the two countries. Respondents had purchased flowers in the past year and results were segmented by factors such as age and gender.

In France, the research focused mainly on customer photography preferences of how the flowers were presented in advertising, rather than on how they were delivered.

The findings underlined the need to take different consumer preferences into account. In Germany, most prospective customers were comfortable with online purchasing – 87% said they had done so in the past – but 43% had never bought flowers on the internet.

"We also found that ease of ordering was an important factor in the flower-buying experience, as was offering minimal and eco-friendly packaging options," Masterson says.

The company used the findings from the research to ensure its marketing messages were suitable for a German audience. The research into bouquet and packaging design preferences helped it to identify what products to show in adverts, while segmenting the data identified the target market for the ads.

The majority of respondents preferred hand-tied flower bouquets to the letterbox format that was the cornerstone of Bloom & Wild's UK business. Two-thirds of potential customers in Germany opted for the hand-tied design, a figure that remained consistent across men and women.

The research was used to inform an advertising campaign in the country, emphasising the hand-tied bouquets that appealed more to the new audience.

The research has helped Bloom & Wild take root in mainland Europe, by making a simple tweak to appeal to new markets.

Dealing with uncertainty

While Covid-19 is a global crisis, how we respond to uncertainty and anxiety has cultural differences. By Ipsos Mori's Oliver Sweet

Governments across the world leaned heavily on wartime analogies as they responded to the public's search for reassurance during Covid-19. French president Emmanuel Macron stated that the country was 'at war' several times in a 30-minute speech, while New York governor Andrew Cuomo said: "Ventilators are to this war what bombs were to World War II." But this isn't a war, it's a pandemic. So why are leaders using this combative language?

Whether intentional or otherwise, the use of wartime language gives people a reassuring sense that we've been here before. It offers the idea that society has faced this kind of 'evil' previously – and because wartime history is written by the victorious, it acts as a rallying call that unites people, helping them believe that they will 'win' this time, too. However, uncertainty has grown as the crisis continues. Have governments made the right decisions? When will lockdown end? Will a vaccine be produced? Why don't medical staff have enough personal protective equipment?

During a global pandemic, combined with a looming recession, the future feels in the balance. There is uncertainty surrounding our health, finances, and even when we can next give our mums a hug. Dealing with uncertainty is a culturally relative concept, however. Some nations are happier than others to wake up in the morning and figure out what's happening that day.

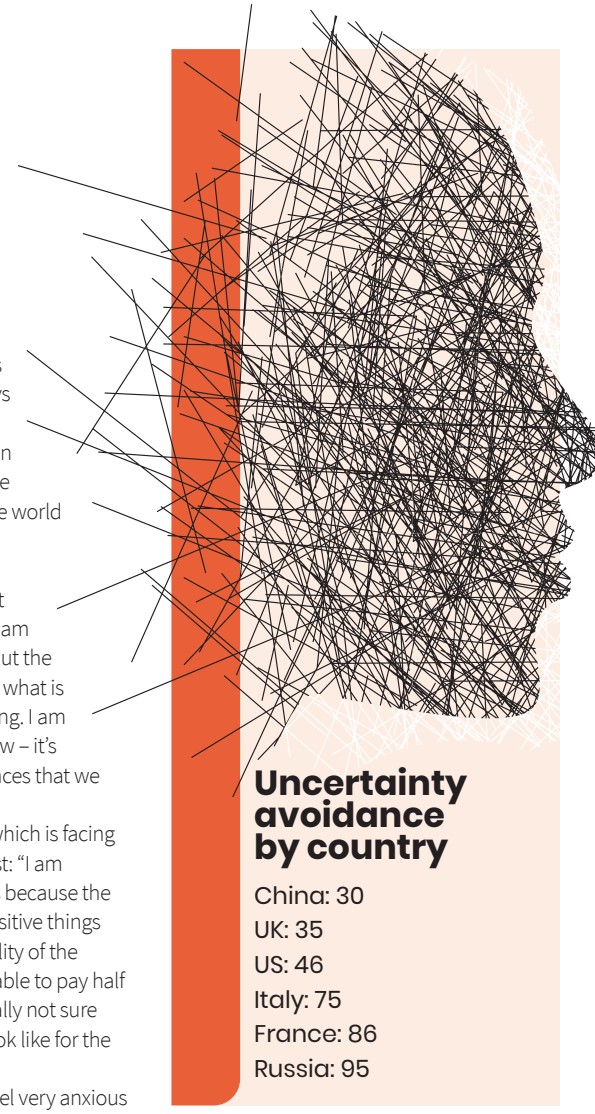
Hofstede Insights has created an 'Uncertainty Avoidance Scale' that looks at the cultural response to uncertainty. It says uncertainty avoidance concerns the way a society deals with the fact that the future can never be known. Such ambiguity about the future leads to anxiety, and different cultures deal with that in different ways (see panel).

In the global study we've run on the Covid-19 pandemic, we have heard people all over the world express feelings of unease:

- Respondent from the UK, a country reasonably good at dealing with uncertainty: "I am trying to go with the flow, but the uncertainty of not knowing what is going to happen is unnerving. I am not worried about tomorrow – it's the longer-term consequences that we don't know about yet."
- Respondent from the US, which is facing more uncertainty than most: "I am slipping through the cracks because the news is saying there are positive things happening… when the reality of the situation is that I was only able to pay half of my rent for April. I am really not sure what things are going to look like for the coming months."
- Respondent from Italy: "I feel very anxious generally – anxious about my job and the outside world. I try to keep myself distant from that."

Some countries, such as China and the UK, are quite good at dealing with ambiguity, and are quite happy to 'see how things pan out'. In contrast, others – including France and Russia – struggle with the idea of uncertainty, and need to see a path mapped out to avoid anxiety.

So, while punchy messages of overcoming an 'invisible enemy' might temporarily unite people, anxiety is ultimately generated by people's ability to deal with uncertainty. Consumers in Russia and France will want to hear clear messages that there is a plan in place, whereas Chinese people and Brits may be more open to messages about opportunity.



Uncertainty avoidance by country

China: 30
UK: 35
US: 46
Italy: 75
France: 86
Russia: 95

(Source: Hofstede, G., Hofstede G. J., & Minkov, M. (2010). *Cultures and organizations: Software of the mind*, revised and expanded 3rd edition) Lower scores in the Uncertainty Avoidance Index (UAI) indicate countries that are more comfortable with ambiguity.

In times of crisis, the ability to tailor messaging to focus on 'certainty' or 'opportunity' will resonate in different ways depending on where they sit on the scale.

While we may have a 'common enemy', how we deal with this crisis will be culturally relative. Could it be the impetus for the US to decide that a social healthcare system might be the answer, or will it simply galvanise the siloed industry fuelled by anxieties that existed before this crisis? One thing is for sure – people are looking to brands and governments for reassurance.

Oliver Sweet is head of ethnography at Ipsos Mori

CITIZENS' ASSEMBLIES

Weighing it up

Recovering from a global pandemic could be the ideal moment for a citizens' conversation. Jane Simms **explores the rise of citizens' assemblies and the future of deliberation**

Among the reading matter for MPs to peruse over the summer – whether or not their traditional recess is cancelled – will be the final report from Climate Assembly UK (CAUK), the national citizens' assembly that began in a Birmingham hotel in January and culminated, under lockdown, in participants' homes in May. Commissioned by six House of Commons select committees, and run by public participation charity Involve, the assembly sought to address how the UK could best achieve net-zero carbon emissions by 2030.

The climate assembly was high profile – environmentalist David Attenborough attended its first session – and its 110 participants were highly engaged. Yet, for all the time and investment that went into it, its success will be judged, ultimately, on whether the government acts on its findings. At the time of writing, we don't know whether the report will even be debated in parliament.

Citizens' assemblies involve a representative sample of people deliberating and reflecting on complex or sensitive issues, gathering and evaluating information, in a series of concentrated sessions that are informed by experts and facilitated by unbiased moderators. The idea is to deepen democracy, give citizens a say in how they are governed, and build understanding among politicians about the trade-offs people are prepared to make – which, in turn, informs and gives credibility to policy decisions.

CAUK is one of several citizens' assemblies springing up around Europe. Much of the new interest stems from the success of an assembly in Ireland, which ushered in changes including same-sex marriage and abortion – contentious issues that had proved impossible for government on its own to resolve.

Although they seem like the public engagement tool *du jour*, citizens' assemblies are not new. Some of the core tenets – including 'deliberative democracy' – hail from ancient Athens: in 431BC the Greek statesman Pericles judged that "[public discussion] is an indispensable preliminary to any wise action at all".

Basic principles

The notion that everyday citizens should participate in public decision-making was revived in the early 1970s by American Ned Crosby and German Peter Dienel, who created – independently of each other – the 'citizens' jury' process and 'planning cells' respectively. They only found out about each other's work 14 years later, and became lifelong friends and collaborators. While the basic principles remain sacrosanct – such as representative samples, neutral moderation, small group discussion, and the time and environment to deliberate properly – both approaches have evolved over the years. For example, the Nexus Institute, run by Dienel's son Hans-Liudger Dienel, now uses the internet to broaden public awareness and understanding of the process.

The UK is a latecomer to the most recent iteration of the citizens' assembly party – because, suggests Viki Cooke, founding partner of international insight and strategy consultancy BritainThinks, of "culture and political commitment – it's a long time in this country since national policy issues were looked at through this lens". But it seems like an idea whose time has come.

Polly Mackenzie, chief executive of cross-party think tank Demos, says: "Many of the big challenges we are facing are not simplistically responsive to a single expert answer: what matters is what we can agree on." What's more, citizens' assembly advocates could be pushing at an open door. In its manifesto, the Conservative party pledged to establish a constitution, democracy and rights commission, "to restore trust in our institutions and in how our democracy operates".

However, some researchers who have been using deliberative tools and techniques with national and local government clients for many years, are concerned that some of the new purveyors of deliberative democracy are trying to prescribe – and even brand – tools and methodologies that should, arguably, be part of a generic approach.

"A focus on 'the means' rather than 'the end' risks the very democracy, empowerment and participation that deliberative approaches should be fostering," says independent consultant and MRS fellow Paul Vittles. "The methodology should serve the process, not drive it."

Vittles says that a healthy democracy needs both wide participation and deep deliberation, and that online forums can complement traditional face-to-face interaction – something "the fundamentalists in the 'deliberative democracy wave'", as he calls them, resisted until Covid-19 forced them to change. He points out that Climate

Assembly UK sent out invitations to 30,000 randomly chosen households, and 1,500 responded asking to be considered. The fact that 1,400 people were effectively rejected by CAUK, which sank its £520,000 budget into an assembly for 110 people, makes it, Vittles says, "the worst example so far of depth of deliberation at the expense of breadth of participation".

The narrow focus by the increasingly influential Sortition Foundation – which was established in 2015, on the ancient Athenian practice of sortition (taking a random selection of citizens and sorting them into a representative sample) – risks devaluing alternative legitimate methods used by researchers for decades, adds Vittles. "The national climate assemblies in France, Scotland and Ireland didn't use postal sortition. In France, Harris did random phone sampling and, in Ireland, they took 60 random locations and sent interviewers door to door with quotas to reflect the population profile, to get a representative sample."

A balanced approach

While 'fundamentalists' debate the finer methodological and philosophical points of citizens' assemblies, research companies are, by and large, pragmatic.

"It is important to have standards, quality thresholds, a framework and principles to work to, if the process is to be respected, but there needs to be a balance," says Suzanne Hall, research director at Ipsos Mori. Rob Francis, head of central and local government at research and engagement consultancy Traverse, agrees: "The methodology is very important, but it is also right to be able to challenge the criteria, rather than following them slavishly for the sake of orthodoxy."

Cooke points out that "one of the principles of deliberative methods is their effect on the decisions ultimately taken". Mackenzie believes the reason the government hasn't adopted any of the recommendations made by the citizens' assembly on social care in 2018 is that it was "commissioned by the wrong people" – not the government, but MPs, who lack the power to take things forward.

Even Climate Assembly UK is not guaranteed success according to these criteria – so it's not surprising that some agencies find working at a local council level, or for an individual government department, more rewarding. "There is a lot of interesting work outside the big, high-profile, complex, public policy issues," says Cooke. She cites a recent project the agency did for the National Infrastructure Commission (NIC) on road congestion, which was designed to gauge people's attitudes to different policy levers and help the NIC to understand whether deliberation was a good method to use in future.

Success can be measured in a variety of ways. NatCen Social Research conducted what it claims to have been the UK's first online deliberative poll using video-conferencing software last year. Its aim was to determine people's views on the future of Britain and governance post-Brexit, and whether – and why – those views changed as a result of the deliberations. It was largely an experiment to find out whether the conditions needed for effective deliberation could be replicated online.

Ceri Davies, who leads NatCen's programme of deliberative research on citizen engagement in policy-making and democratic innovation, explains that the agency essentially replicated online what it typically does in a physical location. It recruited 320 people through a random probability survey among its own panel of 3,000 people, drawn from the British Social Attitudes survey. It ran a feasibility study on what software to use, decided on Zoom, and then did "lots of development work" to build technological capability in its own team and participants. It sent out a pre-session questionnaire to gauge opinions on the topics being discussed – immigration, food policy and consumer rights – and followed that with briefing materials on the topics. The event took place over two days on the hottest weekend in June.

NatCen learned a great deal from the experiment. For example, the attrition rate was around 43%, compared with the 20-25% typical of face-to-face deliberative polls. The weather undoubtedly had an effect, but the agency also recognised that it is easier not to turn up to an online event than it is to a physical one where hotel and travel costs have been paid.

On the positive side, people were willing and able to deliberate meaningfully online, in a sustained way, with some saying they enjoyed being involved from the comfort of their own homes.

NatCen is refining its approach but feels confident to proceed with online deliberation and polling now it has, says Davies, "proof of concept that it is a way of having conversations at scale".

Issues that NatCen and others need to grapple with include 'digital exclusion' and the tiring nature of staring into a screen all day. Shorter sessions, spread over more days, could be part of the answer, as could 'asynchronous' solutions, where individuals post thoughts over an extended period – although this challenges the view that all participants need to be in the same 'room' at the same time.

Additionally, while digital deliberation may, in the short term at least, exclude some people, it is likely to include others who find it difficult to attend a physical forum.

Navigating trade-offs

If we accept that citizens' assemblies and deliberative approaches are "a way of thinking, an approach, not a brand", in Cooke's words, they can be used to address a range of challenges – even in the commercial arena, albeit to a limited extent given the guiding principle that they contribute to the greater good.

BritainThinks and Traverse both do deliberative research for clients in the energy sector, helping them resolve issues such as how to fund innovations that won't necessarily benefit today's customers.

Francis says: "A fast-fashion brand could, justifiably, use the technique to work out how to become more sustainable, because consumers are a big part of the solution to climate change."

Mackenzie describes citizens' assemblies as "a useful supplement in representative democracy", adding that, had they been used to determine exactly what question to pose in the Brexit referendum, we would have been saved three years of misery after the vote "trying to work out what it meant".

Recovery from the Covid-19 crisis is an ideal opportunity for a citizens' conversation, given the tensions and trade-offs to be navigated as we emerge – climate change versus airline bailouts, and privacy versus keeping infection rates low being two obvious examples.

Current polls – including one by the Scottish government – are essentially about taking the temperature, says Francis, who believes it would be "an opportunity missed if we don't have proper deliberative conversations, at a local or national level, over the next few months, and feed the results into what will be, as a result, a far richer and more nuanced response to how we get out of this crisis."

Some people advocate legislating for citizens' assemblies, but others are wary of institutionalising 'methodological bias'. Valuable though they are, they are not, says Mackenzie, a panacea: "We also need to find ways for much more mass participation and openness around the choices that government makes."

In politics, as in business, you have to decide what problem you need to fix before selecting the best tool – or, typically, mix of tools – to do it. Seizing the newest, or shiniest, can be a mistake.

"Sometimes you need a hammer, sometimes a screwdriver – but if you try to do the job with the wrong tool you're going to end up with a lot of broken things," says Mackenzie.

Oxford citizens' assembly on climate change

In January 2019, Oxford City Council declared a climate emergency and commissioned Ipsos Mori to recruit, coordinate and conduct a citizens' assembly to help determine how to tackle it at a local level.

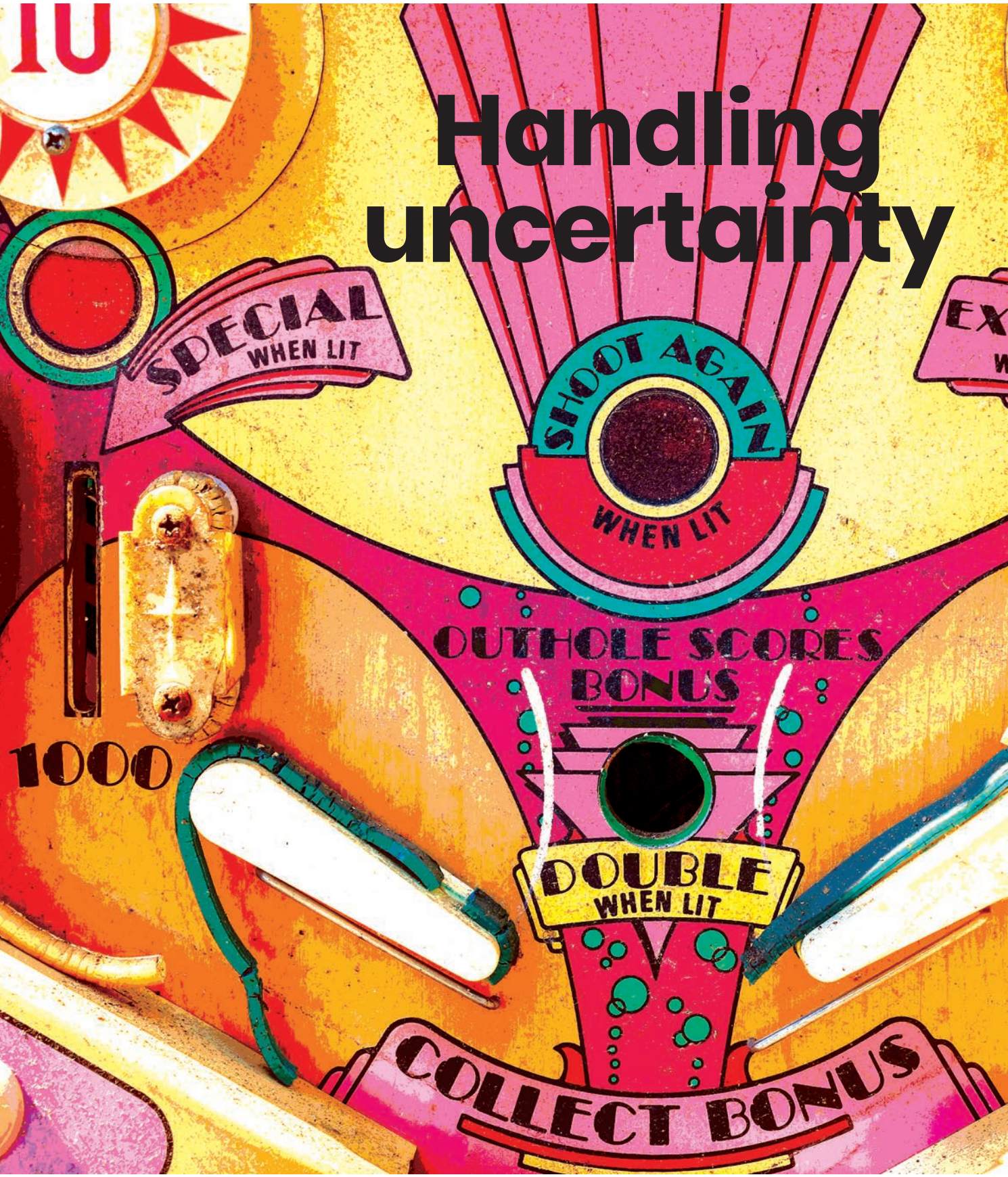
Fifty participants spent two weekends deliberating the following question: "The UK has legislation to reach net zero by 2050. Should Oxford be more proactive and seek to achieve net zero sooner than 2050?" The council was keen to understand the sacrifices and trade-offs people would make to achieve net zero, so the deliberation focused on five areas over which it had some control – waste reduction, buildings, transport, biodiversity and offsetting, and renewable energy. Participants listened to expert presentations, deliberated in small breakout and larger plenary sessions, and voted on key issues.

They were overwhelmingly in favour of Oxford striving for net zero before 2050, but there was little consensus on an alternative date. The scale of the problem and need for change were greater than they had anticipated, but they felt rapid change was possible. There had been low awareness of existing initiatives, and people felt more optimistic once they heard about these. They also anticipated civic pride from Oxford becoming a leader in the climate crisis.

However, they felt the burden of change was being placed on individuals, and wanted to know about the role of large businesses and government.

These findings provided signposts for action, and the most tangible measure of success was that Oxford City Council set a climate emergency budget that commits more than £1m additional operational funding and £18m of capital investment to address the climate emergency.

Handling uncertainty



In a world of uncertainty, continuous insights can help businesses anticipate and respond to change – building resilience for the future.

By Catherine Turner

By the time you read these words, written so very recently, the world will have changed again. The Covid-19 pandemic has changed everything – for everybody and every business – since hitting the headlines earlier this year. Some businesses will not survive; others will pivot and thrive – and, for these, resilience will play a crucial role.

Consumer behaviour is changing faster than ever, either enforced by emergency legislation, self-imposed through new social sensibilities, or entrenched; trends such as a drive to digital deliveries and collection are more than mainstream now.

Polls are a bellwether of customer attitudes for marketers and customer insight teams, particularly in times of change and crisis, but to build resilience – the ability to adapt quickly while maintaining business continuity – organisations must take an always-on, long-term approach to insight.

Dom Boyd, UK managing director for offer within Kantar's insights division, says: "Resilience is so much more than tactical optimisation or effective firefighting. It comes from understanding where value lies in a market, what values your brand uniquely brings to deliver that value, and taking powerful actions that drive performance by balancing the short with the longer term.

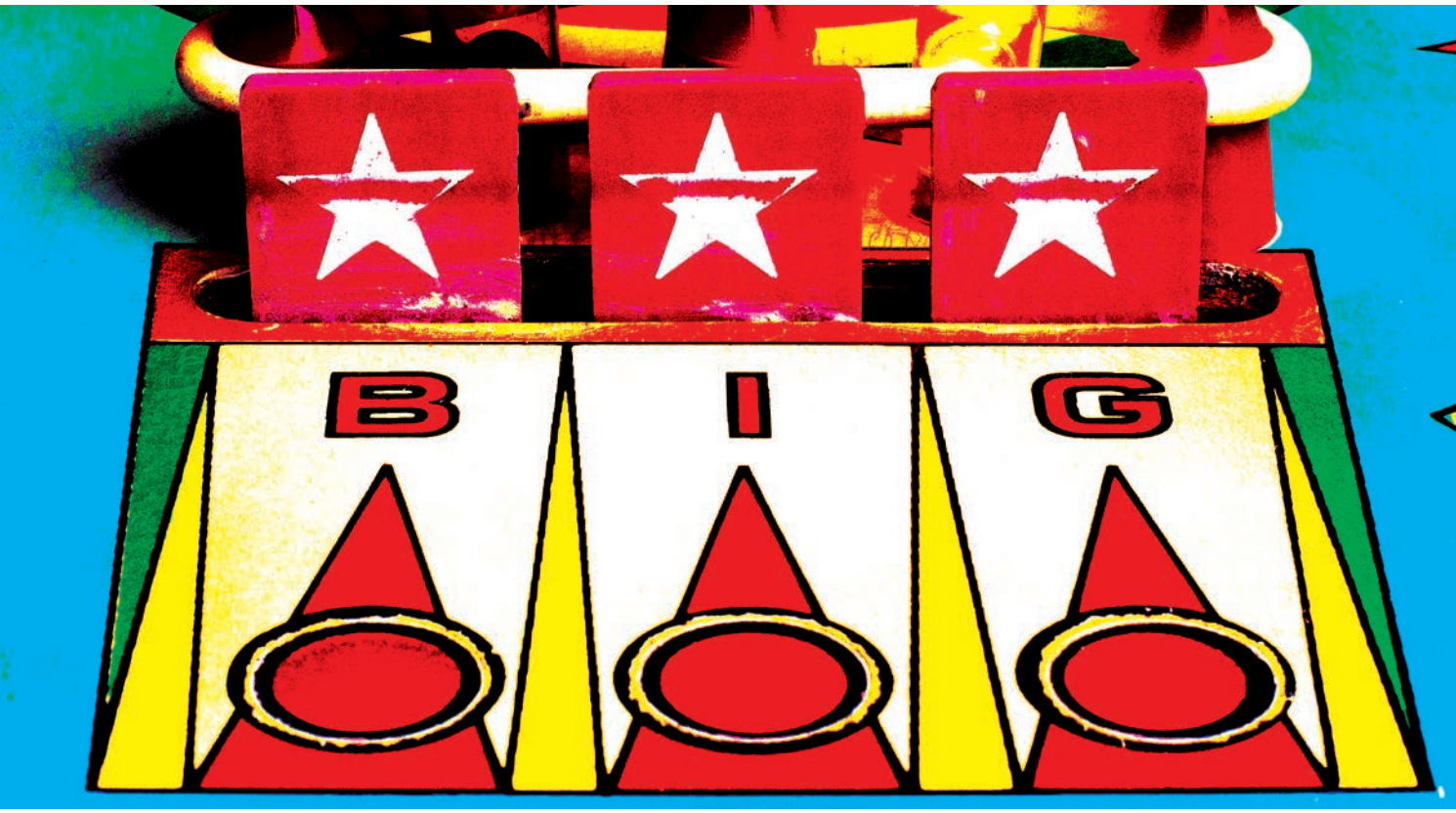
"Too many organisations seem stuck in permanent tactical mode, blindly responding to whatever the latest data is without putting it into a useful strategic context or framework."

Without that context, it is impossible to prioritise resource or to effectively monitor the return on investment of actions over the short or long term, Boyd cautions.

Paul van Gendt, CMI director for People Data Centre (PDC) at Unilever, believes the need for insight outputs delivered quickly will take on greater importance. "The world doesn't sleep between two insight studies," he says, predicting that near real-time insight – the immediate feeding in and processing of data that allows for contemporaneous insight outputs – will grow in volume and stature.

"We believe that the research industry can benefit from increased speed of turning insights into ideas and actions. The need for near real-time insight is only going to increase in the future."

Strategic application of insight is vital in a changing and heated crisis such as Covid-19, but it also allows



businesses to anticipate and respond to unexpected events, and to build resilience for the future more effectively. Van Gendt says: "We've allowed our business to understand current and future impacts on our consumers, our supply chain, and even our own workforce."

Ben Shaw, director of brand consultancy at Engine UK, says: "I still think that, too often, [previously] data was being used to prove that decisions made in the past were correct. Whereas, now, we're seeing how data can provide a more predictive way of understanding what's going to happen. That, for me, is very exciting."

Yet, the market research industry is feeling the pains of cost cutting more than most. The last IPA Bellwether report published before the UK outbreak of Covid-19, for Q4 2019, showed that, although pre-pandemic marketing budgets were edging upwards – with growth predicted into this year and next – marketers were reporting drops in research spend.

According to Nic Bulois, co-founder of Insight Angels and a former quantitative insight director at Added Value, the insight function has been allowed to slip down the value chain for too long, for too many brands.

"More than ever, businesses need to forecast and know exactly where they're putting their money. They need to make the right decisions about what is critical"

"More than ever, businesses need to forecast and know exactly where they're putting their money," he says. "Budgets are declining, and they need to make the right decisions about what is absolutely critical – where they're going to get that return to have the impact and ensure they're staying alive with consumers, now and in the future."

An organisation's insight function has never been so important in the fight to shape business and brand resilience, now and against future crises and uncertainty. The pandemic has highlighted the short-termism under which many companies operate, kicking the can down the road until adversity strikes – be that accounting errors, scandal, or a disruptor changing the table stakes.

Others, however, take a much longer view. Tesco, one of the essential supermarket retailers at the forefront of the pandemic, was somewhat prepared: four years ago, chief executive Dave Lewis ran a 'doomsday' management exercise, which imagined that its head office would have to shut down completely.

The prophetic drill meant the retailer was ready for remote working, with only around 30 people at any one time in its HQ in the early months of

lockdown, the *Guardian* reported. The company also responded quickly to the need to accelerate home deliveries, employing hundreds of extra drivers.

The lessons businesses learn now should resonate for some time. For the UK grocery market, Covid-19 accelerated an overall trend towards online sales, which accounted for 11.5% of the market in May (according to Kantar data) – but the shift to online was already happening, representing 7.4% of grocery sales before the pandemic.

While most retailers were scarcely prepared for the massive uplift in demand for deliveries, other players ramped up their grocery efforts, with the likes of Deliveroo making a small number of products available in urban areas within the hour.

Similarly, video-conferencing tools and streaming services have experienced a huge uptick in usage as organisations grappled with remote working, and people sought connection and entertainment during social distancing.

Never has the term 'vuca' – volatile, uncertain, changing and ambiguous (see panel) – been so apt.

Responsive and resilient

Yet, a pandemic of this proportion has long been mooted, and it is not the only (though it is, by far, the biggest) disruptor businesses face today. Any crisis or set of unexpected circumstances can shake businesses out of inertia, giving them the opportunity to change their operating models to deal with fast-evolving situations.

"There are huge opportunities to apply more insight into organisations more quickly, particularly at the moment," says Boyd. "I am also a big believer in the power of historical data and how you can use that to understand dynamics and create benchmarks – there is value there. But there is danger in driving forwards while looking in the rear-view mirror, especially in situations where market conditions are changing."

Brexit has forced many in the UK and the European Union to look at how to cope with any number of eventualities: soft, hard, 'no deal', delayed. New market entrants, particularly direct-to-consumer brands, have also moved the needle on customer expectations and experiences, particularly in the online world.

In Gartner's CMO Spend Survey 2019-2020, chief marketing officers reported competitive insights and analytics as the two most important areas supporting their marketing strategies over the next 18 months.

Lessons from previous disruptive moments can offer insight for businesses and researchers. Forrester analysis of the 2008 financial crisis found that customer experience leaders had a shallower

Vuca

Vuca is an acronym, first used in 1987, to describe the volatility, uncertainty, complexity and ambiguity of general conditions and situations. It draws on the leadership theories of Warren Bennis and Burt Nanus, and was introduced by the US Army War College in the 1990s to define the end of the Cold War world and subsequent collapse of the USSR.

In recent years, organisations have taken the concept on board to help demarcate the challenges they face and the strategic opportunities available to them. The meaning of each element serves to enhance the strategic significance of vuca foresight and insight.

V – for volatility – stands for the nature and dynamics of change, and the nature and speed of change forces and catalysts.

U – uncertainty – is about the lack of predictability, the prospects for surprise, and the sense of awareness and understanding of events and issues.

C – complexity – is the multiplex of forces and confounding of issues, the no-cause-and-effect chain, and the confusion that surrounds organisations.

A – ambiguity – relates to the haziness of reality and potential for misreads, as well as the mixed meanings of conditions.

The four elements give companies the context in which to view their current and future state, presenting boundaries for planning and policy management.

downturn, recovered more quickly, and achieved three times the total shareholder returns in the long run, compared with the market average.

There are clear parallels with the financial crash and the current crisis, according to Engine's Shaw. He believes that data analysts and insight executives could feed into the business imperative, as risk managers did back then.

"Suddenly, risk management was central to the banking industry and was transformed from this grey, dull area into this central intelligence agency of their businesses. That's akin to the insight function of a business battling the Covid-19 fallout today," he says. "Insight is going to be instrumental in getting the C-suite around what the state of play is now and for future strategy setting."

Data that allows businesses to understand the current picture and measure changes over coming months will ensure that they are best placed to continually respond to changing situations and consumer behaviour.

"Brand resilience is built on authenticity, so understanding the sources of data that can measure perceptions and building blocks of authenticity will be key," adds Shaw. It requires measuring business data, such as employee wellbeing and the employer brand, as well as the customer side.

Shaw advises businesses to use data to predict behaviour, rather than assuming what people have done is what they will always want to do – but, he adds, building models that predict and expect the right answers immediately is a major challenge.

"There is a process to go through to ensure the right data sources, the right quality and the right structures are in place. Then, brands need to adopt a 'test and learn' philosophy," he says.

"Data, in itself, will not be gospel. There are many other elements that need to be part of the decision-making. Any data models and methodologies need to capture these as well, so it is critical to build the right feedback loops to understand what works and recognise that the data will not always result in the right decision."

It is important that businesses look to the future and anticipate what lies ahead at both a macro and micro level, says Shaw. One of the big challenges of that is reconciling passive data with consumer sentiment – such as needs, feelings, thoughts and intentions – as the same behaviour can be driven by very different motives.

Where most organisations struggle, according to Shaw, is in integrating the observed data across digital and customer relationship management (CRM) channels with softer, survey data looking at

psychological, emotional, and needs. "For true resilience and innovation, you need both."

Another issue Shaw cites is that many still view 'agile' research as merely 'quick'. "It's actually organic and collaborative research, where various data is used to paint a holistic view of the problem and solution. It means that you choose your data as you learn about the problem," he says.

> **"Agile research is organic, where data is used to paint a holistic view of the problem and solution. It means that you choose your data as you learn about the problem"**

For Oliver Worsfold, associate director at Savanta, there are two roadblocks to insight being used to form the evidence base for decision-making. "The decision-makers feel they know enough already to make the decision – for instance, through previous knowledge and gut feel – and the insight is, potentially, going to go out of date quickly; this is particularly true during the current pandemic," he says. "To overcome this, work and effort invested early will reap dividends: stakeholders need to be warmed up and engaged early in the process. If they can feed into the research design, and even the brief itself, they are much more likely to act quickly and decisively on the results."

Any work done to align stakeholders with the current knowledge in the organisation, and how the new insight will augment this, will create agility further down the line, Worsfold adds.

He cites Barclays as an example of a company that is able to make decisions almost in real time, using an insight management platform that gives teams feedback about customers by reducing the time lag between collection, analysis and delivery.

The platform collects data from customers frequently, via short, in-the-moment surveys that are then uploaded for use by everyone, from centralised insight executives to branch managers.

Conducting surveys where respondents know they are personally identifiable did raise questions of bias, but it also shows how businesses can be flexible with traditional notions of robustness to put business outcomes above the concerns of "pure" research, according to Worsfold. By closing the gap between information collection and decision-making, Barclays has been able to ensure that its business-critical choices are better informed, and changes in customer opinion or market conditions understood earlier.

Bulois agrees about the need to be flexible to deliver timely and valuable insight, saying that agile insight is "fundamentally about using what exists, synthesising it, and fostering a discussion around hypotheses and scenario planning". He adds: "I have found a lot of clients are really ready to engage around discussions about what tomorrow will look

VistaJet

Business aviation company VistaJet launched in 2004, offering a new model for private flights. By giving customers access to a fleet of aircraft around the globe on an hourly basis, it disrupted the then corporate model of leasing or owning jets.

Now, though, it faces its biggest challenge – and opportunity – as the consumer and corporate travel markets face the most restrictive and testing conditions they have ever faced.

First-party data is the company's bread and butter. It has access to many data points that customers have to give legally, or willingly, to get the luxury service for which they are paying. This is augmented by social listening and a CRM programme, as well as second- and third-party data.

In the wake of Covid-19, the company is overhauling almost every aspect of its pre-pandemic strategy – from marketing and advertising to CRM, the services it offers, and the customer segmentations it targets. It has also commissioned Harris Interactive to carry out ongoing sentiment analysis in its biggest market, North America.

"Customers are talking to us about paying whatever it costs to be safe," said Matteo Atti, VistaJet's marketing and innovation director. "We need to see what is happening in the tension between fear and desire."

like based on what is agreed is imperfect, but better than nothing, data."

The personal touch

"The challenge as a big brand is if you don't know your own audience or the data," says Paul Frampton-Calero, president, Europe, of marketing services agency Control v Exposed. He believes it is why the successful direct-to-consumer (DTC) brands have been able to build niche, loyal audiences that have attracted the corporates to a more performance, data-informed mindset.

Take Netflix, which has built its business on analysing every part of it and using this to understand the future needs and desires of its customers – from delivery to the content suggested to viewers, to the future of content creation. It pivoted from being an online mail order DVD service in 1997 to a streaming business in 2007, producing its own content from 2013. That year, the company's director of global corporate communications said there were 33 million versions of Netflix. It offers a tailored experience for each individual using the service.

Unilever wanted to move from mass marketing to personalisation at scale, based on near real-time analytics led by augmented intelligence – AI and human analysis. Five years ago, it introduced 'People Data Centres' (PDC), and now has them in 30 countries across 27 languages, supported by 250 insight specialists. The company's aim is to get a real-time read on what its consumers think, want and need, to communicate to them and inform product development and business strategy to future-proof the business.

Each PDC focuses on three core sources of data: social and business analytics, call centres, and CRM. To date, it has delivered more than 7,000 insights services across Unilever's three divisions and all stages of the marketing life-cycle.

During March and April this year, internal demand on PDC capacity surged as the C-suite wanted up-to-date information on navigating uncertainty and achieving existing growth plans. The service has also been extended across other functions, including HR.

Van Gendt says: "This is our true secret sauce: integration of various data sets that exist inside and outside our organisation. We have the ability to integrate business data, market research data, and Careline Services' data with social, search, ratings, reviews, blogs and forums."

Now, Unilever – and partner Capgemini – are opening up the technology behind the PDC concept for non-Unilever brands on a commercial basis. They are working on briefs for a number of businesses, including a high-end liquor brand that was struggling to expand beyond its core market.

According to Kees Jacobs, digital proposition lead at Capgemini, this type of insight is becoming business critical, both in times of crisis and of growth. "Leveraging [such] services will help companies accelerate, and give direction to their journey to become more consumer-insight driven and to demonstrate the value of doing so."

It will also help companies in their continuous processes to serve their customers better. "Especially at a time of disruption, using this next level of consumer insights will help to shape business resilience," says Jacobs.

Working together

While technology is important, partnerships are still key. At first, Unilever brought Capgemini on board for thought leadership, before the companies jointly built the PDC proposition, choosing the tech, data and tools it would use. "We recognised early that we didn't have all the skill sets required to achieve our vision internally. We needed to bring the best of the outside world into Unilever," says Van Gendt.

"It makes sense to work with partners who have expertise that doesn't exist in your organisations.

We've also learned to consider scale before undertaking pilots. If you can't see how the pilot could scale, don't do the pilot, which is resource intensive."

He adds that as Unilever has scaled the PDC to new locations, it has leaned on Capgemini and other partners to help resource the teams to deliver insights and ideas back into the business.

Worsfold advises brands to shift their relationships with research agencies to benefit from regular insight injections and consultancy, rather than treating them in a transactional fashion. Such an arrangement instinctively leads to more future-focused strategies and relevant insight, he argues.

Businesses of any size can benefit from the right partner and from using insight as a business tool, rather than a communications one, says Bulois. For instance, a recent conversation he had with a client involved its chief financial officer: "He was sharing confidential information because he knew that the power of research and insight could help shape their future growth," says Bulois.

For business and brand resilience, insight must be embedded into business as (un)usual, not just when things go wrong. In times of crisis, it is inevitably all hands on deck, but often, afterwards, the learnings are quickly forgotten.

Boyd says: "If anything, this whole situation highlights the uncomfortable truth that business is unusual. If we try to make believe that it's usual, then we're frankly not trying hard enough."

A further challenge, he adds, is how the insight function operates in times of crisis and relative calm. Boyd cautions against running on full speed all the time, suggesting that change is hard, particularly for a company's people. You need to bring them with you – easier in hard times than otherwise.

"This is a moment of organisational reset," he concludes, "where there are changing consumer needs, expectations and behaviours.

"One of the upsides of these challenging times is that it will help organisations move forward, effectively to better operate and to exceed expectations, and make them more resilient in the future."

"This whole situation highlights the uncomfortable truth that business is unusual. If we try to make believe it's usual, then we're frankly not trying hard enough"

Get qualified with MRS

10,000 professionals qualified in 10 years

Leading range of research qualifications

Recognised route to competence in the sector

MRS DIPLOMA
IN SOCIAL AND MARKET RESEARCH PRACTICE

MRS ADVANCED CERTIFICATE
IN SOCIAL AND MARKET RESEARCH PRACTICE

MRS CERTIFICATE
IN MARKET RESEARCH

Visit: www.mrs.org.uk
Contact: profdevelopment@mrs.org.uk

MRS Evidence Matters™

Mischief maker

Comic relief is ingrained in Beano's history, and the brand is using insight to stay on top of what kids care about in 2020. By Katie McQuater

"At the moment, our most visited posts are dad jokes, so I think there's an appetite for some fun and light relief for children," says Helenor Gilmour, director of insight at Beano, speaking via Zoom in the midst of the UK's lockdown. "When the schools were closed, we had a little girl saying to us that it felt really serious, but now they've settled into family life, so a bit of light relief is a great thing. Obviously, we've got to keep the nation laughing."

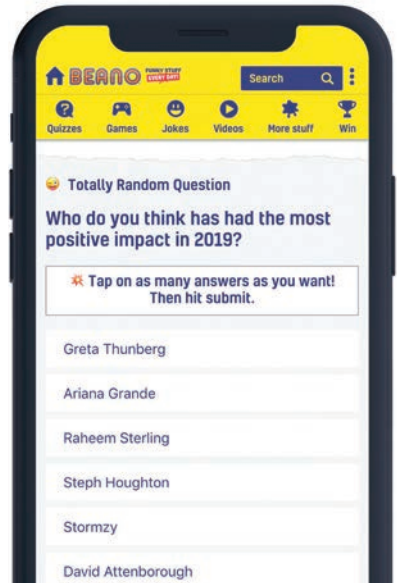
Laughter is Beano's business. An increasingly rare breed in publishing, as Britain's longest running comic, it began life in 1938 and has been a childhood companion for many generations. In 2016, it was relaunched as part of Beano Studios, an entertainment network inspired by the original comic. Beano.com is now one of the biggest online channels for children, offering games, quizzes and jokes.

It is undoubtedly part of a crowded digital space and, with a notoriously fickle audience and 'cancel-culture' rife, the company has made insight a central part of its approach as it looks to capture children's attention (and imagination) and stay relevant.

Beano Studios, part of publishing group DC Thomson, conducts a range of research activities to understand better not only with what children are engaging, but also their thoughts and motivations about subjects ranging from school and sport to their families and friends. This includes an ethnographic 'Trendspotter' panel of 40 children aged seven to 16, observational home visits, a parents' panel and user experience testing.

For Gilmour, the current pandemic has validated the company's methodological approach as it tries to make sense of what's important to children at such an unusual time.

"We believe in the value of the depth of relationships that we have with kids and families and the longitudinal and ethnographic value of it but, at times like these, it's really come into its own. The kids and their families trust us – we switch on the webcam and say: 'Tell us about your week,' and they just open up," says Gilmour. "As a society, we've really opened up to each other, haven't we?"



"A bit of light relief is a great thing. Obviously, we've got to keep the nation laughing"

This is especially evident in the feedback children are sharing about their experiences of life during lockdown. Gilmour adds: "There's a sense of communities coming together – kids are telling us that the highlight of their week is the Clap for Carers on a Thursday because they're seeing their neighbours. The kids – and even teens – are enjoying that, whereas classically we would see teens push back on things like that."

Given the increased time spent at home as a result of school closures, it's unsurprising that Beano.com saw an uptick in website traffic during lockdown, averaging 2m organic monthly users in the UK and the US, up from 800,000 pre-lockdown.

However, looking at the timings of logging on and off showed a quicker drop-off in the evening than the publisher had seen prior to the pandemic – a result of what Gilmour attributes to families making a concerted effort to spend time together for a shared evening meal. This is backed up by findings from the Trendspotters panel suggesting that families were spending more time together, for example, by watching a film together via Disney+.

All of this raises a bigger question of whether the pandemic will change the role of children within the family unit in the longer term, with families homeworking together and children communicating with friends digitally. Beano is focusing its strategic efforts on trying to understand this – not only to predict what impact it could have on its core business, but also for the businesses of its Beano Brain insight consultancy clients and its creative agency Trouble.

"We've spent 20 years building spaces that are open plan to bring families together and now we're talking to kids who are building dens to try to get some me-time," Gilmour observes.

In one sense, the pandemic has created the ideal environment for research, as some of Beano Brain's clients have realised, she says.

"It's a classic research technique, to remove whatever it is you're researching. For clients interested in sport and activity, it is a fascinating time [to look at] what they mean to children."

There is no one clear picture emerging from this peculiar set of circumstances, however, and lockdown has also highlighted some uncomfortable differences in terms of families.

While children who have access to a garden or outdoor space have become more active than usual, the "flipside" of that, says Gilmour, is hearing from those who don't. "That's been quite difficult to listen to. Although they're getting on with it, they're not having the same experience – we can absolutely contrast the experience from the kids who do have access to outside space."

Clients have been interested in how children from more disadvantaged demographics are coping with the situation, Gilmour says. "A lot of clients are just asking: 'What can we do to help?' Previously, the question would be: 'What's the opportunity?'"

Character development

At the heart of Beano is its stories, and insights are used to help drive that forward, whether it's in terms of informing content strategy around what children are interested in for Beano.com or for the *Beano* comic, which has around 20,000 subscribers. "The reason for a lot of the methodologies that we've developed was around driving content – it's fundamental."

Insights can also help inform new opportunities around the brand's intellectual property.

"There's also the Dandy IP in there, there are lots of different channels we could look at. It may be that Minnie the Minx could become a live character who is a YouTuber with her own gang of mates running a podcast for example. It's about taking the essence of what we have and using insights to drive that even further."

The insights team is involved in the next series of CBBC's *Dennis and Gnasher Unleashed*, for example, and character development – making sure that the characters are relevant to children today.

Insights are shared within the business on a fortnightly basis, with a

Game plan

The Football Association (FA) worked with Beano Brain on qualitative and quantitative research for the launch of its SuperKicks app, including user experience testing.

The initiative was aimed at engaging children aged five to eight in football and to equip them with the core skills needed.

"We explained the barriers for children and how if a child hits a barrier too soon, or feels like they don't have the competence or can't do something quickly, they won't carry on," says Gilmour.

Beano worked with the FA to remove certain technical terms from the app, for example, 'free kicks' was changed to 'kicking the ball', and rather than 'penalty areas', the app referred to 'swamps full of crocodiles'.

The UX team worked on the development of the app and user interface testing, involving a technique where kids could trial the app via their own device at home. This led to "useful early information" on the "barriers" and "technical glitches", adds Gilmour.

Research to understand the language used by children involved face-to-face video research with the Trendspotters panel.

release containing key points on up-to-date influencers and the trends in which children are most interested.

The Dundee-based editorial team and the insight team also discuss the content plan and calendar, and what Gilmour terms "early spots" from the research – topics being discussed by children in the playground but that may not yet have made their way onto the radar of brands, publishers and parents alike.

In recent times, these have included Fortnite – Gilmour says the team spotted it "quite early" and was therefore able to develop content accordingly – and Animal Crossing. Alongside the trendy, sometimes transient topics, there are also longer-lasting ones, including Harry Potter, Lego and Disney.

In 2019, Beano produced a report on Generation Alpha – children under the age of 10 – and established five hypotheses on their behaviour based on semiotic and quantitative research and a survey of 2,000 children and their parents. In addition, the company analyses behavioural data and digital analytics from the website and findings from its panel, all of which can be used to test content ideas on Beano.com and assess the response.

At the start of 2020, Beano Studios launched an omnibus service to survey children and youth directly within Beano.com. It works by slotting a survey question into a quiz, but questions must align with the website's editorial policy. In this way, the publisher can offer 1,000 responses from children aged between seven and 14, by age, gender and geography – UK or US. Responses are anonymous, as Beano.com does not collect personally identifiable data on its website.

The omnibus has already highlighted one particular finding that contrasts with data collected from research with parents about children's social media use. When children were asked directly about what digital platforms they use, TikTok ranked far more highly than it did for parents completing Ofcom's research (Ofcom Kids Media Report, February 2020).

"As parents, we all feel quite judged, whereas kids instinctively give you an answer," says Gilmour, but stresses she isn't claiming that one form of research is more valid than another.

"We've got quite a close relationship with Ofcom and when we saw TikTok mushrooming, we presented to them and said: 'You need to be aware of this because we feel it's blowing up' and it's helped that we're able to quantify that now."

Delivering data

Online food delivery increased during the Covid-19 lockdown, and Deliveroo is banking on data-sharing within the organisation to help keep its brand in the public eye.
By Liam Kay

Since social-distancing restrictions swept in earlier this year, many of those who liked to indulge in a meal out have had to rely on ordering online instead. And judging by the number of teal and white-clad cyclists slaloming through our towns and cities, there's a good chance it is Deliveroo bringing the food.

Founded in 2013, the delivery company has hit the headlines recently. As with many of its competitors during the pandemic, Deliveroo has brought in new no-contact delivery policies and has been offering free meals for NHS workers. The company has also attracted new investment from Amazon. The Competition and Markets Authority has provisionally accepted the deal, but its investigation was not yet complete at the time of writing.

The company is a prominent part of a burgeoning food delivery industry that was worth £8.4bn in the UK in 2019, according to data from MCA Insight. This was an 18% increase on 2018, and the signs are that the sector will continue to grow in the years ahead.

Insights are at the heart of Deliveroo. Jake Steadman left Twitter last year to join the company as vice-president of customer insight. His focus is to develop policy and strategy in three areas: consumers buying meals through Deliveroo; riders delivering those meals; and the brand's relationship with the restaurants that prepare them.

Steadman's team is still relatively small. There are two people on the consumer team, another couple on Deliveroo's rider team and one focusing

Customer insight includes work on the impact of Deliveroo's advertising and sponsorships, as well as brand tracking. The company has high-profile sponsorships in place with the Football Association and the ITV television show *Saturday Night Takeaway*.

With data so widely used across the organisation, collaboration is key. The company uses a system of "guilds" to allow people to focus on each of the three parts of its business model – consumers, riders and restaurants – and share data with other colleagues working elsewhere in the firm. For example, the consumer knowledge guild includes everyone responsible for understanding the consumer in the insights, user research and business intelligence teams.

"There are lots of different teams analysing data, and we can sometimes answer similar questions," Steadman says. "The executive team may ask us on restaurants. Two more employees are multi-disciplinary and work on different parts of the customer experience team. But the team punches above its weight – data insights are widely used across the business, and access to data is a key part of the company's philosophy.

It works closely with the behavioural insights department at Deliveroo, which is much larger and comprises several data scientists analysing the information collected from the company's app, for example.

"What we do is overlay attitudinal data onto behavioural data," Steadman says. "We know through our behavioural insights team what customers are doing and can infer why, but it's my team's responsibility to answer the 'why' holistically."

about future trends for the takeaway industry, but they will also ask for that from other teams. We answer them collaboratively. We work in partnership with our peers to provide a holistic answer to the customer, whether that is a consumer, rider or restaurant."

Covid-19

Deliveroo may be a tech start-up at home in today's digital world, but it is not immune to the stresses and strains created by the Covid-19 pandemic. Delivery riders are at risk, while restaurants have been closed in the lockdown. The economic fallout expected in the months and years ahead will also have an impact on restaurant partners.

However, Deliveroo has adjusted. Morrisons, Marks & Spencer, and numerous small newsagents and corner shops have joined as customers in the 'restaurants' section of the business. This is in addition to putting in place the no-contact delivery policy, and free meals for NHS workers.

Insights have played a role in the adoption of these policies, albeit as part of a broader team effort. Deliveroo has a daily tracker for Covid-19, run with Kantar, that helped influence company strategy in response to the lockdown (see boxout overleaf). Steadman stresses that his team is not the only one involved in influencing these policy and strategy decisions – "it is always a collaboration and triangulation of multiple data points" – but it has helped inform the company's approach to the pandemic.

"Consumers are still thinking about what this means, what the 'new normal' means and what roles brands play within that," Steadman says. "I think they appreciate things like contactless delivery, and our work supporting the NHS is certainly a positive, as we want to help. As an employee, I am proud of those initiatives. In terms of the broader impact on consumer opinions, we need to keep working hard, helping and supporting. It is too early to say what the 'new normal' will be."

"Consumers are still thinking about what the 'new normal' means, and what roles brands play within that"

Deliveroo has also launched its first research community to get a better insight into its customers, particularly during this uncertain time. The community is run in partnership with ResearchBods.

"It is going to be an important tool to allow us to be much more agile in how we handle the different challenges the business has, especially around Covid-19, where we may need to get insight from customers very quickly," Steadman says.

Democratisation

Deliveroo's principle of democratising data broadly means that almost anyone in the main business can access behavioural and attitudinal data held by individual teams. The company has an API integration between its behavioural insight tool, Looker, and its brand tracker to allow people across the company to see the information uncovered by the tracker. This brings its own challenges, and Steadman says his team has to ensure its data is not only accurate, but able to be understood and used by others across Deliveroo.

"We have to be conscious that people may be telling stories using data that we, as the customer insight team, own. This means we have to be super tight methodologically to make sure all the data we put into the business is right, accurate, easy to digest and understand," he says.

"In terms of how we report, we first do it collaboratively with the other teams and guilds. As far as possible, we build a cohesive story that covers both behavioural and attitudinal data."

Steadman's time at Twitter has also influenced his approach to presenting insights data to a wider audience. According to Steadman, Twitter used a concept called the 'theatre of research' to help make information more memorable to others, and to ensure the main insights taken from a piece of research were the correct ones.

"If you present 100 graphs on 100 PowerPoint slides, everyone is going to switch off at some point and remember one key point differently," he says.

"So, we are making sure we tell our stories in a really compelling, creative way that is memorable and emphasises the key points. I have carried that over from Twitter to Deliveroo, and we try to think creatively about how we deliver our messages outside of just another presentation."

Steadman says the level of collaboration needed to maintain this approach is one of his team's biggest challenges. "We know what we are doing well in terms of customer insight, but when a company is growing at the speed we are, it is vital that we work with other teams to ensure there is no duplication or inefficiencies being introduced into the system," he says. "That is a challenge – it takes time to build those relationships and to share what you are doing consistently across the business."

Despite this, Steadman feels that Deliveroo's approach to data and its API integration with Looker is "the future". He says he is unaware of any other firm using a similar system. There remain challenges – the potential for data to be misinterpreted is chief among them – but he argues that the positives outweigh those risks and his team is taking steps to mitigate the potential for mistakes.

"As business intelligence or data science functions become bigger within organisations, how the existing customer insight team partners with them is critical," Steadman says.

"We have to be super tight methodologically to make sure the data we put into the business is right, accurate, easy to digest and understand"

"We are inputting our data into Looker because it is much more actionable, efficient and democratised."

The team doesn't yet have all the answers, however. "One of the challenges with the democratisation of data is that once it is democratised, how do you control the narrative? To a certain extent, you do not. You need to make sure that the right data goes into the system in the first place and that it tells a very clear story.

"We need to make sure that, as our data is being used and analysed within the organisation, we are part of those conversations."

Changing direction

The customer insight team recently introduced a daily Covid-19 tracker run by Kantar. The suddenness of the coronavirus pandemic left precious little time for companies to adjust before social-distancing restrictions were imposed and working from home became mandatory for many.

Such an extreme overnight change in culture and lifestyle meant it was important for Deliveroo to assess what the impact could be on the brand, and how its customers were changing their behaviour in response to the pandemic.

"As soon lockdown was implemented in the UK, we knew we needed to monitor customer perceptions in relation to our brand and category closely," Steadman says.

"'White label' solutions were beginning to come onto the market, but none felt specific enough for us or our customers. In 48 hours, we had briefed, designed and commissioned a daily tracker, with initial results every 24 hours thereafter, reporting to the entire business."

The move is an example of how the team – and Deliveroo more broadly – can respond to events, according to Steadman. As late as January, a worldwide pandemic was on few people's radar, and yet most of the world had entered some form of lockdown by the time spring had begun.

"It's a good example of how quickly we can make decisions and change direction as an insight function," he says. "We had to pause multiple strategic projects, including our customer segmentation, in order to free the resource needed."

As the situation with Covid-19 calmed and settled into a new status quo, Steadman's team decided to shift from running a daily tracker to every couple of days. But with a great deal of uncertainty over the future of the pandemic, it remains an asset to the company's future planning.

Tackling **toxicity**

Artificial intelligence could become a tool in the arsenal of businesses looking to prevent employee misconduct and understand more about workplace culture – but there is a fine balance to be struck. By Katie McQuater

Since the #MeToo movement prompted a global conversation about sexual harassment and uncovered multiple stories of workplace misconduct, the issue of how we behave at work is under more scrutiny than ever.

At the same time, algorithms have become an inexorable part of modern life, and now – as well as serving us recommendations on what to watch, listen to, or eat – they are making an impact on the workplace and how people are managed.

With businesses experimenting with new applications of artificial intelligence (AI) to hire recruits and monitor performance, perhaps it was inevitable that the next frontier would be managing people and their behaviour. Advances in natural language processing have given rise to technologies designed to monitor written exchanges between employees, giving firms insights on how staff interact and detecting signs of bullying or harassment.

While the use of AI to pick up harassment in emails appears to be nascent – according to the *Guardian*, such technology is being used by law firms in London – it could become more commonplace as organisations try to stay one step ahead of misconduct and higher numbers of staff work remotely. However, applying technology to such a sensitive human problem raises questions over biases, culture, accuracy and trust.

Transparency

Just getting the data to make AI technologies robust in the first place could be difficult, according to Prasanna Tambe, an associate professor at the University of Pennsylvania's Wharton School, and co-author of a paper on applying AI within human resources management.

"For these systems to work well, you need to have a lot of instances in your data. If you're talking about one organisation, when you get down to harassment or toxic employees, you don't have a lot of examples. You need to have a lot of cases – not just one or two, or even five or 10."

Companies using such tools would also need to ensure they are transparent about how they are used and what decisions are based on. There are a range of AI technologies making recommendations based on a number of factors, and while some are transparent in how they reach decisions, others

are "considerably more opaque", says Tambe.

"If you're trying to use an opaque system to predict something that's going to affect an employee's career trajectory, there's a lot more to contend with. Those limitations become much more significant than they have in the past."

The transparency question has implications for the professionals overseeing the systems – the tech in itself does not solve the problem, it merely flags it. As such, it's more useful to think of such systems as tools for HR managers rather than a substitute for human decision-making. Tambe adds: "We're not at the stage where it's OK for employees to get direction from an algorithmic bot, so to speak. So if an AI system identifies something as being an issue, what is the oversight on that going to be; where is the human element?"

Cultural nuance

Human decision-making is also necessary to train the technology in the first instance, but defining what constitutes harassment has potentially negative cultural ramifications for companies, both in terms of the design and people's reactions to it.

Heledd Straker, a workforce futurist at PA Consulting, says: "Bullying and harassment is entirely cultural and all to do with language, and language changes all the time because it reflects the perceived realities of certain groups. Also, people behave differently if they think they're being watched, so you could end up with [harassers] becoming less 'visible'."

Lack of diversity among developers means that everyday cultural nuances can be lost when a system that is optimised to achieve one goal is put into practice in the real world – for example, in 2018, a machine-learning hiring tool being developed by Amazon was found to discriminate against women. Straker uses the example of disabled people.

"Because of how high unemployment is for people with disabilities, there is no training data for AI, so it doesn't pick them up and, therefore, AI reinforces the view that disabled people are less able to work," she says.

"Every social group has its own discourse; words and phrases that are shortcuts. It is quite hazardous if you accidentally plug in the phrases for your own people into a technology that's meant for other people. Technologists' views don't necessarily reflect wider society. It's often the white male technologists' view – which isn't necessarily bad, but it's just one perspective."

Everyday cultural nuances can be lost when a system that is optimised to achieve one goal is put into practice in the real world

AI could stifle natural communication and collaboration between employees, says Vijay Mistry, head of employee research at Harris Interactive. "You, as an individual, have established the boundaries with your colleagues about what those lines are, and for us it's acceptable, but for a machine-based technology it might not be acceptable."

Mistry understands why HR might look to AI to optimise processes and streamline some of the more burdensome aspects of the role. However, he's sceptical of companies' ability to employ such systems effectively without significant hurdles.

"At the moment, they're struggling with just how to use big data and advanced analytics," he says. "Conversations around AI are focused on operations, rather than serious issues such as getting to the root, underlying cause of issues such as misconduct.

"Human resources, by its very name, is about the human element and approach. Every employee is different. I don't believe AI is at a point where it's capable of dealing with the volume and complexity of human behaviour."

Trade-offs

From the perspective of employee insight, could analysing how staff communicate help organisations to be better prepared for the future? Mistry cites the financial crisis as one example of an event that could have potentially been prevented had organisations had insight from AI to find out where people were lending when they shouldn't have been. "There is a benefit, but it needs to be traded off with the risk to employee culture," he says.

Determining the true impact in the context of people management requires ongoing measurement and evaluation, says Straker, who co-authored a paper with the Chartered Institute of Personnel and Development that found HR is the business function least likely to be involved in decision-making about investments in AI.

"Essentially, there was no voice of the employee – and given that the vast majority of AI in the workforce will impact people, that needs to be looked at. It's currently on tasks, processes and technology, but it needs to have more of a focus on the people."

Where **credit** is due

Fiona Blades **writes about the impact of diverse business accreditation**

Would you like to be introduced to clients such as P&G, Mastercard and Bank of America? How about procurement helping you to get onto the roster? Some free training programmes from Dell or EY? Learning from business owners across the world? Awards?

If you answer 'yes' to any of these questions and you own a diverse business, consider accreditation.

If you are a corporate client wanting to encourage innovation, inclusion, flexibility, speed and a fresh perspective, join not-for-profit network WEConnect International to meet diverse businesses.

It wasn't until I moved to the US that I saw the importance of recognising Mesh Experience as a women-owned business. In fact, during the Covid-19 pandemic, it has been heartening to receive emails from corporates checking on our status.

There is a benefit to corporates in encouraging diverse supply, beyond simply doing the right thing. Let's check out some facts.

- Jigsaw Research, a certified women-owned business, won Global Agency of the Year at the MRS Awards 2019
- Boston Consulting Group found that increasing the diversity of leadership teams leads to more and better innovation and improved financial performance
- News publications, including the *Guardian*, have reported that countries with women leaders have fared less badly during the pandemic.

Yet diverse businesses struggle to get funding. In 2018, women-owned businesses in the US received only 2.2% share of $130bn in venture capital funding. Whether through unconscious bias or other factors, it is tough for diverse businesses to grow. This is where certification plays an important role.

WEConnect International considers four criteria for Women's Business Enterprise (WBE) certification: ownership, management, control, and independence. To qualify, a business must be at least 51% owned, as well as managed and controlled, by one or more women.

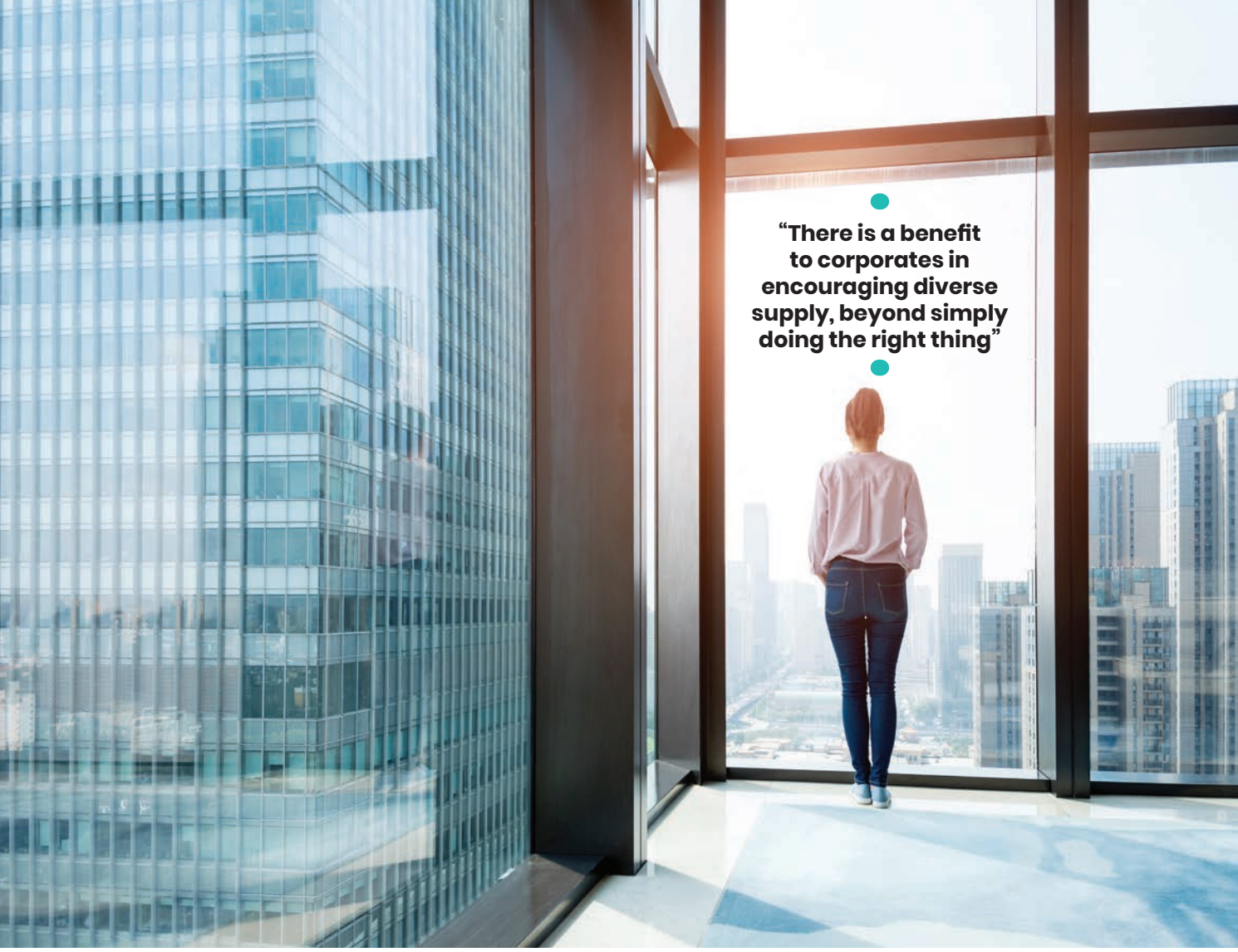
Mesh became certified as a women-owned business five years ago. WEConnect certifies businesses outside the US and WBENC within the US. Each year, there is a joint conference and in 2015, this took place in Austin, Texas. There was a WEConnect day for around 100 delegates to meet corporates in roundtable discussions and hear inspirational presentations.

The next day was the WBENC conference and fair. Thousands of women entrepreneurs attended and there were hundreds of corporate stands. By year two, I had learned that a clear plan of action was essential. Last year, our managing director North America, Dana DiGregorio, attended and made 42 contacts.

However, this does not mean 42 new clients. Even if the diversity person makes the introduction to the marketing/insight procurement person, you still need to meet the chief marketing officer or head of insight. It's unlikely that a head of insight will simply take the advice of their procurement colleagues on choice of agency. However, I have met many heads of insight that say it is difficult to get onto the procurement roster. This is when you play your trump card, and help the insight director by explaining that you know Ms/Mr xyz in procurement and that, as a diverse business, they are keen to help you through the process. This strategy has enabled Mesh to work with a major bank.

If you are an insight director, check whether your company is a member of WEConnect (and lobby for it to become one, if not). This could help you to bring on board more easily new, diverse, innovative companies that you are keen to try working with.

We've also discovered that some existing clients were WEConnect members, including Delta Air Lines. In 2017, we were named the Delta Air Lines women-owned business of the year, which involved a reception in Atlanta, an introduction to the chief



"There is a benefit to corporates in encouraging diverse supply, beyond simply doing the right thing"

executive, Ed Bastian, and a video of our company played at the awards ceremony. For the Mesh team working on Delta and the rest of the agency, having our work publicly acknowledged was enormously motivating. This publicity also played well with other corporate diversity partners as well as our insight clients at Delta.

Meeting other women-owned businesses encourages innovation and the support of shared knowledge in running companies. For example, Mesh has been working with Forensic Pathways to create a dark web monitor for banks. Fraud has become more of an issue, particularly during Covid-19. A data breach can cause a massive reputational problem for companies, so it is not only important to measure brand equity but to monitor data that could erode this too.

Maggie Berry, executive director for Europe at WEConnect, helps make connections with corporates and other WBEs as well as making introductions to organisations, such as the Dell Women's Entrepreneur Network. These can offer training and resources, from legal to marketing, technology and funding. I was also delighted to be invited to speak to 200 women entrepreneurs in Costa Rica about internationalising Mesh and describing lessons I had learned.

The key benefits you could see from certification include:

- Winning business and help through procurement
- Acknowledgement through awards
- Innovation through working with other WBEs
- A network to call upon for help with business questions and training opportunities
- Inspiration from other women's businesses, some with revenues of more than $1bn.

For more information: **weconnectinternational.org**

Fiona Blades is president and chief experience officer at Mesh Experience

"MRS Company Partner Accreditation helps the teams at M&S to develop personally and professionally, building networks and skills that enable better research with sharper actionable insight."

M&S

Hayley Ward
Head of Customer Experience
Data and Digital
Marks & Spencer

"MRS Company Partner Accreditation gives the research we do credibility, and demonstrates its quality, while helping our team build capacity and capability through training and conferences."

Matt Roberts
Global Research Director
Formula One

Company Partner Accreditation

Gain accreditation for your research expertise and join brands including Google, M&S, M&C Saatchi, the FA, Formula 1, Unilever, Asda and Barclays.

Contact:
Grace.agate-bacon@mrs.org.uk
www.mrs.org.uk/company-partner

MRS™

Facts stranger than fiction

We have seen things happen during this pandemic that would have been impossible to imagine in our wildest dreams.

1 The longest 11-year bull market in history has (so far) been followed by the shortest 33-day bear market. From a market peak on 19 February to a trough on 23 March, the longest stock market boom seemingly paved the way for the shortest bust.

2 Historically, investors lent their capital or property in return for interest, dividends or rent. Now governments can borrow for less than nothing, companies are taking advantage of the crisis to reduce or cancel dividends and paying the rent seems to have become an optional extra.

3 Central banks responded to the viral and economic shock with unseen levels ($8tn) of stimulus, with the Federal Reserve cutting its funds rate to zero and even buying junk bonds. Similarly, the Bank of England reduced the base rate to 0.1% and the UK government raised £3.25bn of debt at 0.2%, which was over-subscribed, before issuing its first negative bond with a coupon of -0.003%.

4 HM Treasury has become the biggest employer in the UK, with 8.4m people – 25% of the employed workforce – on furlough, costing up to £100bn in the eight months from March to October. Alongside this, the Coronavirus Job Retention Scheme (CJRS), the government's various credit schemes from the Bounce Back Loan Scheme (BBLS) to the Coronavirus Business Interruption Loan Scheme (CBILS) and the Covid Corporate Financing Facility (CCFF), all inevitably mean future spending cuts or tax rises. Unless, of course, the government issues old-fashioned war loans to be repaid over many decades, of which the UK paid the last (£43m) tranche from World War II to the US in December 2006.

5 In the US, Donald Trump is still hoping to win a second term in office despite overseeing worse fatalities (more than 100,000) than the war in Vietnam and the highest unemployment figures (40 million) since the Great Depression. Go figure, as they say Stateside.

6 Royal Dutch Shell shook the markets by slashing its totemic dividend for the first time since World War II. The price of US oil turned negative for the first time in history on 20 April, plunging into negative territory of -$37 per barrel as demand dried up during lockdown across the world.

7 Ironically, as the UK government was busy printing money, we were busy hoarding loo paper. However, despite the supermarkets being the major beneficiaries of our panic-buying and stockpiling – as well as the government's reduction in business rates – both Sainsbury's and Wm Morrison passed their dividends.

8 In contrast, both Tesco and BP paid their dividends, which – following the accounting and horse meat scandals of the former and the Deepwater Horizon oil spill disaster of the latter – was just reward for their long-suffering investors' patience.

9 During lockdown, we discovered that working from home saves time and the environment, and survey after survey has shown that the vast majority of employees prefer it, but we are social animals and social distancing is unnatural.

10 Iconic retail brands including J Crew, Neiman Marcus and JC Penney went into bankruptcy in the US, while in the UK, online retailers such as Asos and Boohoo had well-received cash calls. Indeed, so far more than £8bn has been raised for 55 UK companies, with share prices up on average by +15%.

11 Very few, if any, corporate risk radars included infectious diseases as opposed to terrorism, cyber security, climate change or nuclear proliferation.

12 Just as the regulator and taxman were moving on to the tech giants, they have become our great redeemers in the time of Covid-19, from online deliveries to online video conferences and online entertainment. If that were not enough, new apps to test, track and trace the virus puts them on the side of the angels. Pitched against our very survival, privacy seems a small price to pay.

As Lenin once observed: "There are decades where nothing happens, and there are weeks where decades happen."

Mapping fire risk

London Fire Brigade is using data science and analytics to understand more about fire, and to shape how the service responds and plans its resources. By Katie McQuater

London Fire Brigade is the busiest fire and rescue service in the UK, covering 33 boroughs, more than 4m homes and a million businesses.

The work of a fire brigade doesn't start and finish with emergency response. Aside from responding to fires in London, the service is firmly focused on prevention. It carries out a number of efforts in this area, including around 80,000 home visits and 1,000 school visits a year to give people advice on how to prevent and detect fire.

In the past decade, fires in London have reduced by 34%, with just under 18,000 fires attended in the city in 2019, compared with more than 27,000 in 2010, and LFB has attributed the reduction to this integrated approach to prevention.

Data is key to informing all of these efforts, from interactive dashboards using Transport for London (TfL) road data to GPS data-mapping the routes fire engine drivers take.

LFB is also using data science and analytics to understand more about the risk of fire and improve the understanding of where to target preventions. A large part of this is the ability to combine different datasets, including publicly available information.

Historically, fire risk has been hard to quantify because properties or people who have had fires are not easily distinguished from those who have not. However, there has been an observation that certain demographics are more likely to have a higher number of fires.

Yet, beyond demographic data, there are various other information sources. Every addressable location in the UK, for example, has a unique property reference number that is looked after by an

address custodian – and one recent project focused on applying analytics to these rich, open data sources to try to predict risk.

LFB initially partnered with data-science company Faculty, which runs a fellowship programme that allows postgraduate students to work with organisations.

"We wanted to explore a new dataset that we hadn't used before, like energy performance certificate (EPC) information, which is publicly available on the Ministry of Housing website," says Apollo Gerolymbos, head of data analytics, insight and reporting at LFB.

However, the EPC dataset didn't match the unique property reference numbers, so LFB also worked with GeoPlace, which is responsible for this data. Other sets, including information on building height, information about fires and other emergencies attended by LFB, and mosaic demographic data at a household level, were used to build an all-addresses corporate database (AACD).

Once the data had been cleaned and the unique identifiers matched, the second stage was machine learning. Various models were trialled and LFB historical incident data was used to train the model and test predictions about historical fire risk.

The project found that EPCs were a better predictor of fire risk than other factors such as building height or property type – and demographics.

"At the end of the project, we saw that the EPC was a better predictor of fire risk than demographics; the idea being that the circumstances that someone lives in may influence their behaviour, which may influence fire risk, rather than it just starting with demographics, which is quite a step change in the way we think."

In future, findings from this type of analysis could be used in operation so that when crews target individual homes for prevention messaging, they use the most effective dataset of predicting fire risk.

New categories

In another project, neurolinguistic processing (NLP) was used to analyse the reports produced after every serious fire.

Firefighters must complete an incident record that involves selecting the category of fire from various drop-down menus and categorical fields. But for serious fires, the fire investigation team records free text of up to 500 words about the incident, containing much more information and context – typically, information that would not be captured in the categorical fields or drop-down boxes. Using NLP algorithms meant that topics in the text could be identified in some cases, highlighting new categories of fire.

While some topics uncovered were well known and categorised already, such as fires caused by smoking, the exercise showed others not previously recorded.

More recently, LFB has been exploring whether dirty restaurants could be at a higher risk of a fire becoming serious. It ran a hackathon with analysts from different fire services to explore the question. In a similar approach to the EPC project, food-hygiene ratings data was downloaded from the Food Standards Agency to see whether a lower rating could infer a higher risk of fire.

While insights from these projects have not yet been implemented more widely within LFB, they form an important part of a business case to build the data-science capability, explains Gerolymbos, who is in the process of expanding the team. "The understanding at a strategic level has been about the importance of data science and analytics in the future of the fire service. They're really valuable projects, because they help communicate why we're asking to grow the data-science function in the first place."

"We wanted to explore a new dataset we hadn't used before, like energy performance infomation"

Another focus for Gerolymbos is trying to understand how resource-intensive different types of fire are – a fire in a rubbish bin requires far fewer resources than a fire in a flat. "Both of those incidents will appear as one fire in the dataset, so you spend a lot of time trying to understand the severity and how resource-intensive a year has been roughly – other than how many incidents we've attended – and trying to look at the utilisation of our resources differently." This could include assessing whether or not resources were tied up and for how long, he adds.

In June 2017, the Grenfell Tower disaster in Kensington cast a shadow over the country, highlighting the devastating consequences of fire. aongoing inquiry, as well as other reviews including Her Majesty's Inspectorate.

These mean that it is the right time to be asking new questions and exploring and analysing new information, according to Gerolymbos.

"All services in the UK are going through the same process at the moment, but projects like this in London are feeding into research about how things are done across the UK."


TIMES ARE
CHANGING*
*Does not apply to The 20 Minute Quote.
Certainty in uncertain times.
Call 0800 032 5939
www.foreigntongues.co.uk
translation@foreigntongues.co.uk
FOREIGN TONGUES®
The Market Research Translation Agency

Time to show the best side of analytics

Another family 'Zoom quiz' comes to an end and the evening turns into a debate about the latest debrief from the government. My household is watching the daily presentations fuelled by data, delivered in PowerPoint slides and with recommendations created from analytics to find the best way forward. This might be as close as they get to seeing what my teams and I do on a daily basis.

What jumps out at me is that analytics is at the centre of the government's strategy for processing and managing the country's approach to Covid-19 and, most importantly, it's a reminder that data-led analytics will need to be a driving force in what comes next.

We are all in different industries, and we come from a potentially difficult starting point because consumer behaviour has never been so disrupted in peacetime. Whether it be holidays, how we shop, buying cars, watching sport, consuming media or how we get to work, all of our regular analytic approaches in these areas will need to adapt. Our focus will be firmly on what is next.

That is where I have the confidence that, as an analytic industry, we will draw on what is best within our research sector and deliver what is needed to give recommendations that will support our ability to kick-start a recovery. However, the industry must bear in mind a few fundamental approaches.

First, we will need to be collaborative. The best of our thinking comes from when we share approaches, ideas and, importantly, the right data. We have already seen how supermarkets were able to connect more openly to find a fix for stock issues and how to navigate products to store. Nielsen has provided data to the UK government to aid analysis on purchasing patterns and the supply of essential items. Pleasingly, we have worked with other agencies to pull together our different areas of expertise to support the food and drink companies with which we work, identifying which products should be in store to aid decisions on production.

We will need to be creative to benefit from that collaborative mindset. As an industry, we are nimbler than we are sometimes given credit for, and one such example was the fast development and adoption of apps monitoring the length of queues at supermarkets, out of stocks, and more. These techniques are not necessarily new, but are using analytics from consumer-led data in a creative way to help people make better decisions. Drawing on the recommendations from this consumer-based data will be important to us all as we move through to recovery.

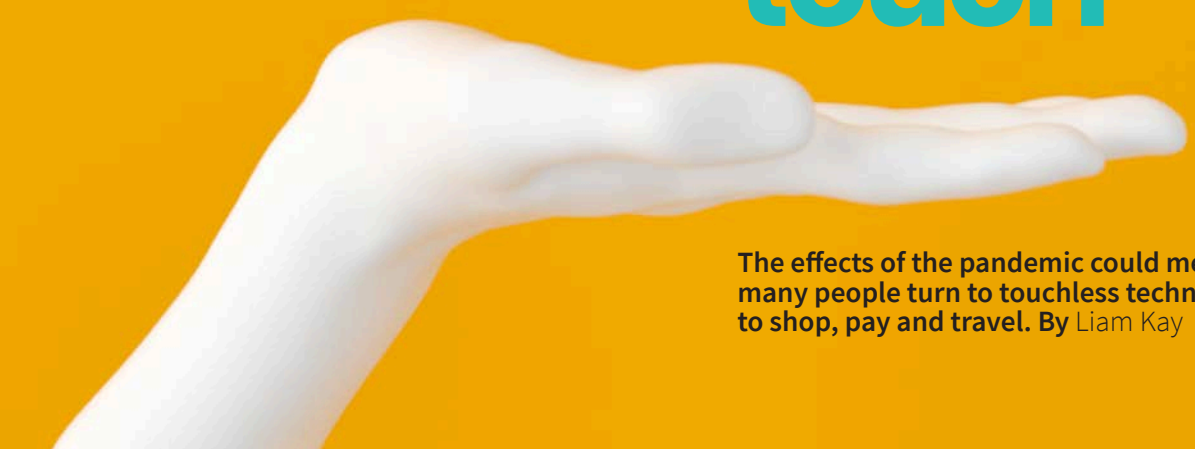
"The best of our thinking comes from when we share approaches, ideas and, importantly, the right data"

We will need to be adaptable in our approach. Certain analytic approaches and research techniques will be scrutinised, as they often draw on historical behaviour to make decisions. We will need to find ways to forecast and combine human thinking with the development of AI to get to the answers we are being asked. Given the variability in consumer behaviour, I expect we will see, across all parts of day-to-day life, that it will be a time when the power of such analytics comes through.

I was determined not to write about Covid-19 in this column, but the reality is it has brought analytics into our homes in such an overt way that it could not be ignored. We will find the analytics that shape the right response and then we should shout about the role analytics is playing.

We need to put this industry in the spotlight to ensure we get the investment we all need to be collaborative, creative and adaptable for when life gets back to 'normal'.

Out of touch



The effects of the pandemic could mean many people turn to touchless technology to shop, pay and travel. By Liam Kay

In a world where Covid-19 is pushing people apart, it is causing them to consider how they carry out routine daily tasks and move around the world while minimising contact.

Technologies that allow interactions to remain hands-free could provide solutions.

Research from Capgemini found that 77% of people across 12 countries expect their use of touchless technologies to increase during the pandemic. The study also found that 62% of people thought this trend would continue after the current crisis ends.

Cashless catalyst?

One example is contactless payment. UK Finance, a trade body for the UK banking sector, found that 32% of credit card transactions and 45% of debit card transactions in the UK were made using contactless cards in February 2020. In that same month, the total value of contactless transactions was £6.7bn, a 13.6% increase from £5.9bn in February 2019.

Other countries are even further ahead. China has long been considered the global leader in contactless and phone payment technologies, with 50% of the population using proximity mobile payments, according to an estimate from eMarketer. The Nordic countries, in particular Sweden, have also normalised payment by contactless and through apps. As many visitors to Stockholm will attest, it is legitimately difficult to spend cash in many places.

Covid-19 could also be a catalyst for more online shopping. Research from Bank of America and the US Department of Commerce shows that, while e-commerce penetration in the US doubled between 2009 and 2019 from 5.6% to 16%, in April 2020 it rose to 27%.

"We are going through the biggest digital training course the world has ever seen," says marketing consultant Steven Van Belleghem. "People need digital for work, communication with friends and family, entertainment and shopping. My assumption and hypothesis is that we would see an increase in contactless use among all age categories."

He says: "Some barriers have been removed, and are gone forever. People have experienced a higher level of convenience and safety, and there is absolutely no reason to go back."

Safety is one of the big drivers of people's behaviours during the pandemic. A survey of almost 7,000 Canadian and American adults carried out between 21 March and 1 April by psychologists Gordon Asmundson and Steven Taylor found that 25% of respondents had high levels of stress about Covid-19, which includes a fear of getting the virus from surfaces in public places.

Emma Chiu, global director of Wunderman Thompson Intelligence, says social-distancing restrictions and people's attempts to avoid contracting Covid-19 have boosted touchless technology.

"One of the health warnings is to try to not touch so many surfaces," she says. "With that in mind, people

are now thinking about all of the surfaces they interact with when doing something as simple as going to the grocery store. If you need to touch a pad to type in your PIN, increasingly people think: 'How many times has that surface been touched by other people? When was the last time it was cleaned?' Retailers who offer contactless payments will be rewarded with consumer loyalty, as they feel safer going there."

Chiu says there could be an acceleration in "using ourselves as payment" for in-store goods. Amazon's 2018 experiment with a checkout-free shop in Seattle is an example of how technology could reduce human interaction in public places. Amazon Go saw people download an app to allow access to the store, with cameras and sensors tracking what they removed and replaced on shelves. Customers' credit cards were charged when they left.

A brave new world

Covid-19 is already ushering in other touchless design features. In Japan, for example, sensor manufacturer Optex has launched a contactless switch that opens and closes doors by holding a hand over a sensor. Fujitec has also launched a lift that comes with an optional contactless panel that uses infrared sensors to select a floor based on the person's hand position over a dashboard.

"People have experienced a higher level of convenience and safety, and there is absolutely no reason to go back"

But what will a more contactless world look like? One of the shifts could be an even greater use of smartphones. It could extend to a hands-free approach in other areas – for example, people could begin accessing hotel rooms, offices or their own homes via electronic 'keys' stored on their phones. Research from experience design company Foolproof suggests that seven in 10 people would prefer to use their phones to connect with services rather than using touchscreens in shops, for example.

Tom Johnson, managing director of Trajectory, says that the pandemic will increase automation and reduce staff interaction in many areas of life, with shop customers keen to keep human contact to the bare minimum.

"What you will see is stores, particularly bigger retail stores, doing more to shift their customers onto contactless modes of shopping," he says. "At the moment, stores are set up to have a certain proportion of their customers do that. You can see that widening as they will be under pressure to reduce human contact as far as possible to meet social-distancing guidelines and reassure the public it is safe to shop."

Voice technology could also have a crucial role to play in running services without unnecessary physical contact. The technology is becoming more popular but has been limited outside home smart assistants. According to Belleghem, voice tech is simply not yet ready for widespread use in public places, but it could be on the cusp of a breakthrough as companies start to experiment.

There is also facial recognition, which has long been controversial because of the privacy implications of its use in public places. However, it seems to be gaining acceptance, albeit temporarily, and could potentially offer a means of identification without the need for touch. The Capgemini study found that 52% of consumers prefer facial recognition for authentication during the pandemic, but that fell to 39% when asked about its use post-Covid-19. It has gained traction in recent years; for example, last year, CaixaBank in Spain allowed customers to use facial recognition to withdraw cash from ATMs.

Chiu expects that whatever happens in the next few months, developers will see now as the ideal time to test new products and experiment with how touchless technology could revolutionise our lives.

"This is the ultimate disruption for every industry, and it is the perfect time to introduce new and unusual habits that connect with safety and hygiene," Chiu says. "People are in the midst of something new to them already."

Beauty is **in the hand** of the beholder

A group of scientists has investigated if people make decisions differently depending on whether the process is visual or involves the hands

In our daily lives, we engage in various activities involving different body movements. We inspect products and advertisements with our eyes, but test products or browse through websites with our hands.

Consider two types of adverts, both featuring a model; one is a print ad that mostly aims to capture the visual attention of the consumer without further involvement, whereas the other is a banner ad that encourages the consumer to move their hand to click on it. Alternatively, imagine a shelf where the consumer looks at a product versus when they need to reach for the product.

Does this difference – looking versus reaching – mean the decision processes are different? According to our research, recently published in the *Journal of Experimental Social Psychology*, the answer is yes.

Our research involved examining how we move our eyes and hands, specifically in response to beauty. In the lab, participants engaged in a very simple numerical task – similar to how consumers would compare prices – in the presence of faces of varying degrees of 'attractiveness'.

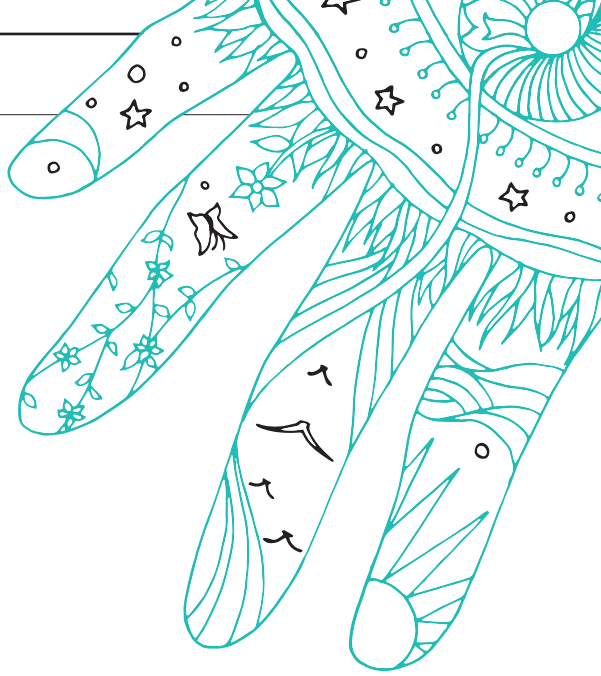
For each trial, participants were presented with three, two-digit numbers: the first one ('basis') was located at the bottom of the screen and the other two ('targets') at the top left and right corners of the screen. They were asked to click on the target that was numerically closer to the basis. Next to each target, one face was presented. Participants were asked to ignore the faces and execute the task correctly and fast.

We arranged the pairs of faces according to three conditions: congruent (the correct number was paired with an 'attractive' face), incongruent (the correct number was paired with an 'unattractive' face), and control (the correct number was paired with one of the two moderate faces).

The images were taken from a standardised and validated database of Southeast Asian faces. 'Attractive' and 'unattractive' faces were selected based on the ratings of a different sample, where faces with an average rating of 0.5 standard deviations above (below) the mean among both female and male raters were categorised as attractive (unattractive). Moderate faces are those with ratings falling in between the range of mean +- 0.5 standard deviations.

Seventy participants (54% females) from Nanyang Technological University in Singapore completed the task while we tracked their mouse movements, and a second set of participants – including 63 people (58% females) from the same university – took part in the eye-tracking study.

We found that the hand and eye respond to facial



'attractiveness', but in different ways. Specifically, people's hand movements are driven by the attraction towards faces categorised as 'attractive', but are much less affected by 'moderate' or 'unattractive' faces.

'Being moved by beauty' is not simply a metaphor; rather, beauty automatically engages hand movement. The eyes, however, tend to fixate on faces on the extreme ends of the attractiveness spectrum, rather than 'moderate' faces.

Advertising perspective

In advertising, the use of attractive models is prevalent, well beyond the marketing of beauty products. At the same time, some brands feature models that are not necessarily conventionally 'attractive'. In fact, Ugly Models, a London-based modelling agency that promotes extraordinary features, has been operating for half a century. It has promoted its models to various brands, from Burberry to Mercedes to Jack Daniel's, and has made additions to various fashion showcases and catwalks.

According to our study, the effectiveness of these approaches from the consumer's perspective might be contingent on whether the media platform of the ad involves their eye or hand movement.

In media where the aim is simply to alert viewers to the message, the extremeness – how 'distinctive' a face is – of the model's face may be more important. In this case, either 'attractive' or 'unattractive' models would capture the attention of viewers. In media that requires hand movements, such as pay-per-click ads or online selling platforms, models with 'attractive' faces might be more effective.

In the study, faces of moderate attractiveness did not seem to influence either eye or hand movement. Recently, companies have started to feature real models to appear more inclusive and authentic. While the merit of this approach might be appreciated by consumers, it may not be effective in gaining their attention to begin with.

Expanding to product aesthetics

This phenomenon could extend to other products – different mechanisms might be engaged when a consumer inspects a product on display (that is, when only the visual system is engaged) compared with when a consumer tests and selects the product (when the hand is also engaged).

In product design, aesthetics can be critical to consumer acceptance and the market success of a product. Meanwhile, products with bizarre and unusual designs – which might not be considered beautiful, yet could attract attention – exist. Both strategies might work equally well in getting the consumer's attention to a product on display; however, a beautifully designed product will mostly have the advantage when the consumer is expected to reach to use the sample.

While our small sample size did not allow us to test the effect of gender (that is, the gender of the participant and gender of the face), future research could examine the effect for each gender combination – women's attention to men's and women's faces or men's attention to women's and men's faces.

Expanding to product aesthetics, more research could also be conducted to examine consumers' attention towards 'ugly food'. Recently, there have been initiatives by start-ups and large retailers to promote the consumption of fruit and vegetables that, while being edible and nutritious, fail to meet retailers' and consumers' cosmetic standards, so end up being wasted.

Using our paradigm, future research could look at whether these products can, in fact, capture consumers' eyes – not just on the shelf, but also in marketing campaigns, such as the 'inglorious fruits and vegetables' campaign by French retailer Intermarché, which encouraged consumers to see the beauty of 'ugly' products.

By Natalie Truong Faust, assistant professor of marketing at Nova School of Business and Economics (Portugal); Anjan Chatterjee, professor of neurology, psychology, and architecture at the University of Pennsylvania (USA); and Georgios Christopoulos, associate professor of decision neuroscience at Nanyang Business School, NTU (Singapore).

Building a more caring world

How might we build and maintain a more caring, responsive world? In her work, researcher Brené Brown shines a light on a powerful behavioural insight – how empathy can motivate us to respond to others' needs and behave more prosocially.

Prosocial behaviour is defined as voluntary behaviour that benefits others and may involve a cost to oneself. If it does involve personal cost, it is more narrowly thought of as altruism. It can range from charitable donations to giving away fruit and vegetables from your garden, lending money, getting your child vaccinated or, during the current era, physical distancing and handwashing.

Prosocial behaviour can be driven by various factors, including eliciting empathy, cooperation or moral values. It may even be driven by a sense of social responsibility. Not surprisingly, initiatives to motivate people to go beyond their personal preferences and think more prosocially are currently very topical.

Studies on how to encourage behaviour change with broad societal benefits often focus on reducing friction, or communicating social norms or personal benefits, to encourage take-up. For example, efforts to encourage more people to have an annual flu vaccine have focused on making it easy, by opting people into appointments, or by framing the personal benefits. While these types of intervention have had some effect, it is only

"Eliciting emotion can be an effective mechanism to drive social change"

in the past few years that researchers have begun exploring whether initiatives drawing on prosocial behaviour can also encourage vaccination.

A 2016 study (Li, Taylor, Atkins, Chapman and Galvani) showed three differently framed messages highlighting victims of flu to almost 4,000 participants from eight countries (China, Japan, Brazil, UK, US, France, Israel and South Africa):

- An elderly victim scenario described a 76-year-old man who contracted flu and eventually died because others had neglected to vaccinate
- A young victim scenario described a five-month-old boy
- An unidentified victim message simply described how neglecting to vaccinate can cause the flu to spread to others, who might die of complications
- A fourth control group saw no message.

The first three messages use framing to help us to take another person's perspective and empathise with their situation, making the potential consequences of our actions salient. The first two messages also have an identifiable victim. We know from research that being able to imagine the plight of one person can help us to take action, because we can more easily empathise with how they are feeling than with the suffering of a mass of people.

All three messages increased people's stated intention to get vaccinated, particularly those who didn't usually get their yearly flu vaccination: 31% of non-vaccinators said they now intended to get a vaccination, as opposed to 24% in the control-message group – a 30% increase. When participants were shown a message with an identified victim, either young or old, intentions increased slightly further, to 32%. Across all eight countries, the researchers found no cross-country differences in prosocial motivations or intentions to be vaccinated.

While this study did not track whether people followed through with their intentions to get vaccinated (it is likely there will be some drop out), it did increase people's willingness – not easy in this era of anti-vaxxers. If this approach was combined with other intervention techniques, such as automatic appointments, it could have a significant impact on vaccination take-up rates. In the US, the CDC estimates that if vaccination rates improved by just 5%, it would have a significant and valuable medical and societal impact.

Another study – very relevant to the era in which we are now living – looked at whether salient signs using prosocial framing could increase rates of handwashing by healthcare workers in a hospital. You might think that healthcare workers are one of the best groups at washing their hands, given their clinical environment. Yet, compliance is far from 100%, particularly among doctors, and research has found that a key barrier to prosocial behaviour is that they think first of the risk of infection to themselves. Second, they discount this risk as they, like the rest of us, are susceptible to overconfidence, believing that they are less vulnerable to germs and disease.

So Adam Grant and David Hofmann tested whether poster messages, framed in different ways and placed next to 66 hand-sanitiser dispensers, could drive up rates of use. A poster framing the handwashing message as a personal risk read: "Hand hygiene prevents you from catching diseases." The prosocial frame read: "Hand hygiene prevents patients from catching diseases", while the control poster, developed by hospital managers, simply instructed healthcare workers: "Gel in, wash out."

While the personal-risk frame led to no change in the use of hand sanitiser, the prosocial frame led to a significant uplift. Healthcare workers cleaned their hands 11% more often and used 45% more soap and gel.

A further experiment across eight hospital wards placed posters with either a personal-risk frame or prosocial frame by patients' beds and asked observers to record whether healthcare workers washed their hands at times when they should, such as before and after patient contact. Again, clinicians did not change their behaviour when the personal-risk frame was used, but did better when the poster with a prosocial frame was displayed by the ward beds. Healthcare workers washed their hands at 89% of all opportunities, compared with just 80% before the intervention or with the personal-risk message displayed.

Highlighting how hand hygiene can improve patient outcomes when the patients are in their field of vision helped to drive more frequent handwashing among doctors and nurses. Perhaps it's harder to ignore or dismiss the message while standing directly in front of a patient.

These findings begin to shape a new empathy-based framing tool in the behaviour-change toolkit – a frame to help us remember that our behaviour often impacts on others. Making salient another's perspective in life and eliciting genuine emotion can be an effective mechanism to drive social change and for creating a more caring and less selfish world.

In the context of Covid-19, former US president George W Bush recently said: "Empathy and simple kindness are essential, powerful tools of national recovery." Prosocial framing could be a very valuable tool over the next few years.

Work in progress

Working in the same way as before the pandemic seems a remote prospect, but how can businesses embed lessons learned now into future flexible models? By Katie McQuater

Six months ago, remote and flexible working arrangements were the exception to the rule. For the majority of us, our working lives were spent in an office.

The Covid-19 pandemic forced an almost overnight shift in the way businesses operate across most industries, with employees moving to working from home and employers left with little time to prepare. Now, while introduced swiftly as an emergency, temporary measure, it looks set to have bigger implications beyond the current crisis.

Twitter changed its working from home policy to allow staff to work remotely in perpetuity, while Google and Facebook said employees would have the option of doing so until 2021. But it's not just the Silicon Valley tech titans. Investment bank Morgan Stanley chief executive James Gorman and former WPP chief Martin Sorrell both anticipate more staff working from home in the future.

Expectations from employees may have also changed – according to April research from O2, YouGov and ICM, 45% of UK workers expected to work more flexibly after lockdown restrictions.

Beyond merely extending the necessary 'crisis mode' arrangements, many businesses are rethinking the way they work more permanently.

Like most others in the research industry, Ipsos Mori made a rapid pivot to homeworking in the spring. The experience means the business now knows it can run largely remotely, says chief executive Ben Page – albeit missing the "serendipity of office conversations".

Page says: "We are likely to be much more hybrid in how we work in future – a mixture of home and office until a vaccine arrives, and probably afterwards.

"The use of Teams has let me directly connect with 1,300 people weekly in a way that previously I did face to face – in some ways, despite shutting the office, we are better connected than ever."

Smaller offices

Insight tech start-up Streetbees is exploring the possibility of a smaller office space, moving to a more permanent flexible model and reducing its business overheads at the same time. The company is considering a hot-desking structure where different teams can work in the office on different days.

"Offering the team added flexibility – where they have two to three days working from home, and a couple of days in the office – will not only work really well for employees, but also for the business," says chief executive Tugce Bulut.

Streetbees monitors staff engagement and wellbeing on a weekly basis, and has found that scores increased during lockdown, suggesting that employees enjoyed having extra flexibility while working from home. "Naturally, when everyone in the team is remote, you have to give people more autonomy and trust them to get stuff done. It's working really well from a team morale perspective," says Bulut.

This example reinforces a strong body of evidence that flexible working is better both for our mental and physical health – we eat and sleep better, and businesses also experience higher employee retention.

Social insight company Brandwatch introduced a new flexible-working policy globally prior to the pandemic. While it plans to have employees return to the office, it is also expecting an increased uptake of the new policy. "It's often hard to break long-standing habits and schedules, so this has shown that mixing things up provides options," says Victoria Miller, vice-president of communications and content.

Remote vs flexible

There is a difference between simply working remotely in response to a pandemic – with many juggling family responsibilities – and truly flexible working in more stable circumstances, where workers determine their own working hours in mutual agreement with their employer.

While the location of work has changed and companies have put in place new digital tools for communication and management, however, the historical systems and habits underpinning them are still alive and kicking – and not all of them are positive.

Changing routines that have been in place since the Industrial Revolution takes work. A study commissioned by LinkedIn and the Mental Health Foundation found that UK homeworkers were racking up an additional 28 hours of overtime a

month during lockdown, and 79% of respondents agreed that there is a culture of 'e-presenteeism', meaning people feel that they should be available as much as possible, including outside of working hours.

Annie Auerbach, co-founder of strategy consultancy Starling, and author of *Flex*, a book on flexible working, cites endless video meetings, leading to 'Zoom fatigue'. "We've taken the long-hours culture of presenteeism and transplanted that on to Zoom. That's the natural way of doing things – transplanting an old working culture on to new digital environments – but I would really warn against it, because it doesn't have any sustainability."

Keeping everyone engaged and well is a challenge for everyone when teams aren't physically in the same location, but this can be particularly difficult for researchers just starting out in their careers. For them, the office offers not just connection with colleagues but also mentorship, support, and ideas taken from chance conversations – a point raised at a recent meeting of the MRS Flex Forum.

Auerbach believes the office will still exist as a hub but will function differently from before. "A long-term solution would be a hybrid of remote working and working in the office with core hours, so we need to be much more intentional about what the office is for and how we use the time when we're all in the office together."

Time in the office should be used to "deliberately build culture, have collaboration sessions and one-on-one conversations" as well as making time for mentoring and learning, she adds.

In the end, much of this issue comes down to trust. Brandwatch increased its employee research during lockdown to cover topics including balancing work and caring responsibilities. But Miller feels metrics such as productivity should be treated the same, regardless of the employee's location. "We continue to track against our objectives in the same way and manage performance as we always have. If there were to be an issue with productivity, that would be highlighted. This is the whole point of flexible working – trust in people by giving them the flexibility."

Adjusting our working cultures beyond the extended period of necessary homeworking requires new systems for trust, according to Auerbach. "In the past, this was built on a face-to-face model. We need new models for trust where we are very clear with objectives for our team for the week and that we trust individuals to do their workload in the way that suits them."

Data protection boundaries know no EU border

Rumour has it, you can take the girl out of the country but not the country out of the girl. The UK might well have left the European Union but it hasn't broken all ties just yet. Whether you are a 48 or a 52, it doesn't really matter when it comes to data protection: its principles, values and ethics are here to stay.

That doesn't mean they are dogma, or not up for discussion. Au contraire! Only one thing is more exciting than a pure doctrinal discussion about rights and freedoms: a practical one. How are businesses impacted? What does it mean for small and micro companies? Can I guarantee the safety of my research participants from existential threats? This is why conversations are important. This is why, when guidelines and guidance are drafted, their aim is not governing the laws of the universe but rather easing everyday life applications.

MRS has always championed conversations, especially with members, but also with other national, European and international associations. One in particular is always close to its heart: Efamro. It is the European research federation, representing the interests of market, social and opinion research in Europe. Its members are national trade associations for research businesses. Its playground is Brussels and the European institutions. Its role is to promote the interests and needs of the sector, make sure that voices are heard, and pleas accepted. And lately, it has been very active.

First things first, a check-up on the GDPR. In April, Efamro published and submitted the position paper 'A Response to the EC's Roadmap Report on the General Data Protection Regulation'. In association with the European Pharmaceutical Market Research Association (EphMRA) and the British Healthcare Business Intelligence Association (BHBIA), Efamro asked the European Commission to:

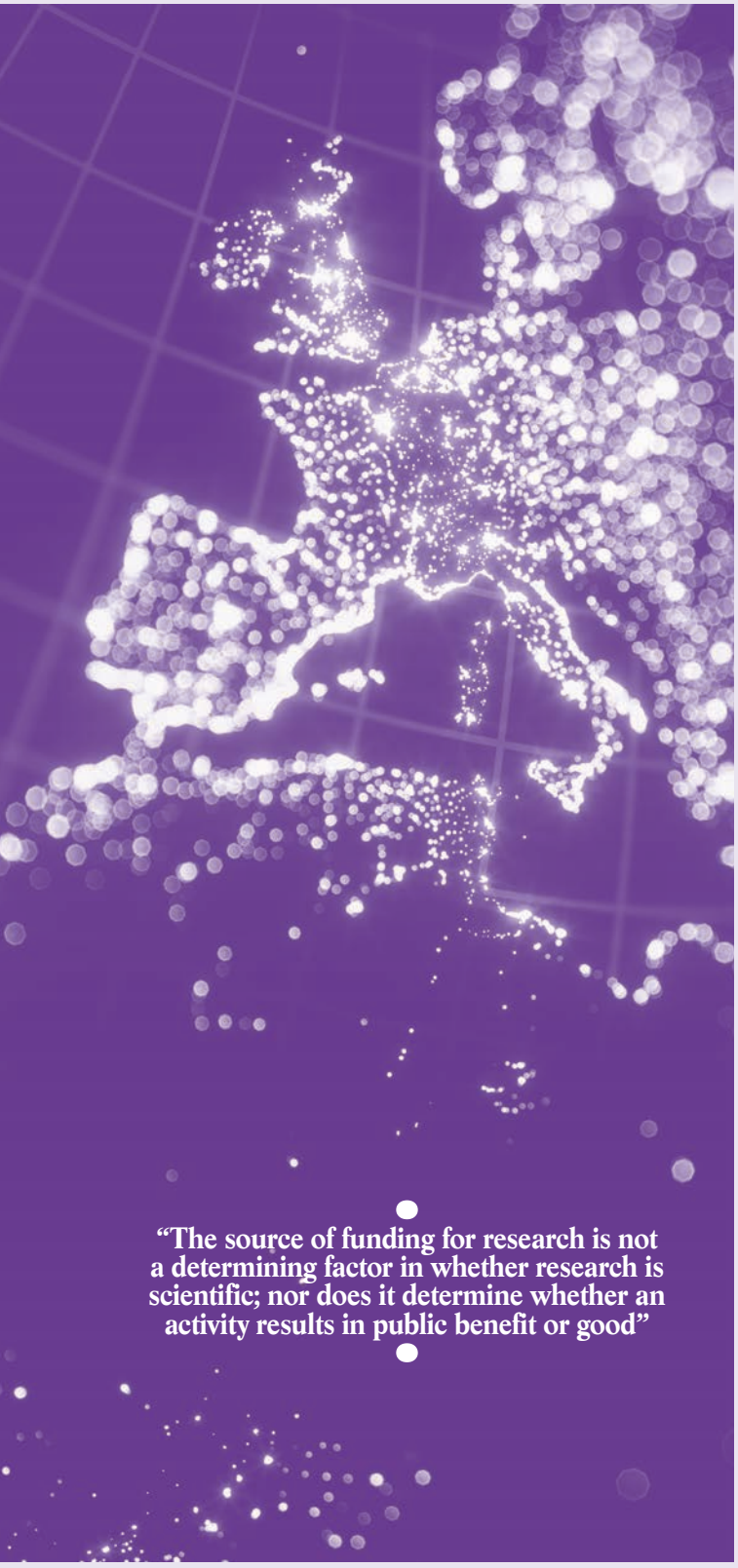
- Review and update standard contractual clauses and adopt new EU processor to non-EU or EEA processor clauses. With only 13 adequacy decisions in place, businesses need to refer to other tools listed in Chapter V. Standard contractual clauses for data transfers to third countries have not been updated since they were originally adopted. The commission should urgently review and revise the standard contractual clauses and consider the needs of controllers and processors with the addition of new clauses to cover EU processor to non-EU or EEA processor data transfers.

- Clarify and publish additional guidance on codes of conduct. The different sectorial experiences in devising sector codes has demonstrated that there is some degree of uncertainty regarding codes of conduct by sectors and the same data protection authorities that should be in charge of adopting them.

- Investigate further and get a better understanding of how the issue of overlapping territorial scopes of national laws implementing the GDPR has affected controllers and processors, and how they are dealing with such fragmentation. The GDPR is directly applicable in all member states but it also leaves a margin for national legislators to maintain or introduce more specific provisions to adapt the application of certain rules. This national margin has resulted in a fragmented legal landscape for some of the GDPR provisions. In turn, the non-uniform application of the GDPR across member states can create obstacles to cross-border operations, even intra-EU.

- Highlight the broad need for practical guidelines. On the one hand, businesses may accept the best analysis that fits their interests and consequently adopt practices that would fall in a grey area at best. On the other hand, by focusing relentlessly on the methods and impacts of technology giants, the realities of micro, small and medium-sized enterprises are being overlooked, as are those sectors, such as research, which follow existing rigorous codes supporting ethical personal data practice.

Among many, one topic in particular is still very much up for debate. For Efamro members, the most interesting example of national fragmentation is the concept of scientific research, which



"The source of funding for research is not a determining factor in whether research is scientific; nor does it determine whether an activity results in public benefit or good"

has resulted in a patchwork of safeguards, with 27 different interpretations of the concept or the absence of a clear definition. The absence of common ground for scientific research is hindering the single market as it is very difficult to imagine European data processing operating in the strict framework of national borders. The concept of research, without additional specification, has raised practical difficulties.

In January, the European Data Protection Supervisor (EDPS) issued a 'preliminary opinion' discussing scientific research – great news, as, finally, one European body has published a position on this. Because of the nature of the EDPS and its mandate, the scope of application is relatively narrow and it's only an opinion. Nonetheless, it provides all stakeholders an opportunity to engage in the discussion – a debate that needs to look at the actual applications in practice, so that the GDPR provisions are not left in the realm of 'possibilities' but can be appreciated and – most importantly – understood by anyone undertaking scientific research that includes personal data.

This is why Efamro partnered with EphMRA and Esomar to publish 'A Response to the EDPS Preliminary Opinion on Data Protection and Scientific Research'. Our position is clear: scientific research cannot be limited to the common understanding of medical and academic research but needs to be considered alongside other forms of research such as healthcare, arts, humanities, social and market research.

The identification of scientific research cannot be limited to juxtaposition of academic versus commercial, private versus public as much as it cannot be of limited consideration – for example, health science is not only medical research and clinical trials. The source of funding for research is not a determining factor in whether research is scientific; nor does it determine whether an activity results in public benefit or good.

Market, opinion and social research is robustly self-regulated by a family of national and international codes of conduct, ensuring that data collected for research is strictly limited to only research, thus preventing harm or adverse consequences to individuals. Compliance with legal and ethical requirements for the treatment of personal data is vital for maintenance of consumer trust. Ethical standards are set out in national and international codes.

A fully functioning framework for scientific research must reflect the approach of the GDPR. It needs to be technology-neutral, relying heavily on both co-regulation and on a 'toolbox' of privately adopted measures that present the undisputed advantage of being fit for purpose within the sector in which they are implemented and, in doing so, transcending the theory and enabling the practice.

While the Covid-19 hiccups may have derailed most of our plans and engagements, it has surely not affected the core of our professions and ethical values. Conversations are important; debates are essential. Whether in conferences, boardrooms or virtual meetings, they help us shape the present and the future. MRS' work supporting Efamro and EphMRA means, irrespective of Brexit, that MRS remains at the heart of the European debate about research, ethics and GDPR. Keep engaging with Codeline and MRS – we are here for you.

REDISCOVER
REPURPOSE
RECLAIM
YOUR DATA.

Think your existing data is redundant? Think again. Understanding the data you already have could be the key to unlocking new insights. With a solid foundation, we can work our magic: consolidating data, extracting insights and delivering findings that directly impact business results.

After all, why create more data when what you already have can give you competitive advantage?

HONEYCOMB.
expect more from data

0161 235 7229
theteam@honeycomb-analytics.com
honeycomb-analytics.com

Getting the sector back to work

I write this at the end of May – such is the pace of a quarterly publication. The first tentative steps are being made to ease the lockdown. By the time you read this, any number of scenarios could have unfolded. The only thing I am certain of is that the economic strictures many small businesses are already suffering will be cutting even deeper in July.

MRS has spent the months since lockdown began lobbying government over issues that could make all the difference to protecting your business. We know how hard it is for you: the research we undertook in May into the impact of Covid-19 on our members was painful reading. Thank you to Sinead Jefferies and her team at Watermelon for conducting it. We have built relationships with many other trade bodies, including the Advertising Association, Federation of Small Businesses and the CBI. The goal has been to amplify our lobbying efforts with organisations who share our structural needs and, so, increase the pressure on government departments.

A key thing for MRS to focus on is helping areas that have stalled to get back to work – see our face-to-face research guidance. Consultations included agencies big and small, as well as the AQR, and ideas that might prove fruitful are freezing dividend tax and requesting tax credit. Please let us have any further suggestions.

I also want to applaud the research heroes who have gone beyond expectations and done something exceptional. Many, if not all, of you will know Bob Qureshi, founder of i-view Studios. MRS put Bob, a new Fellow, together with companies seeking advice from us, and he was happy to help other viewing facilities with rates relief from local authorities. Bob's advice has resulted in thousands of pounds saved for at least three companies so far. Thank you Bob!

I have talked in the past about some key trends I saw continuing to develop in the market, including: the move to blend streams of data and *ad hoc* research; the transition to online; the need for speed; the pressure on ROI; and repurposing and client in-housing. Consultations with the MRS Senior Client Council confirm these trends are accelerating. We need to be shouting loud about the power of research to transform businesses. I want the entire sector to get behind our Intelligence Capital initiative. You can gain double CPD points if you watch this free webinar and read the report as part of your professional development (see **mrs.org.uk/intelligencecapital**).

Finally, if we want to keep research top of mind for clients and their finance directors, then nothing opens up the purse strings like winning an award. Officially, the MRS Awards closed for entries on 6 July, but for those of you who realised too late that you have a story that must be told this year, you'll be pleased to know that – because of the exceptional circumstances – late entries will be considered on a case-by-case basis. Contact **john.bizzell@mrs.org.uk** for more details.

Sector and MRS news

MRS is committed to supporting members and championing the needs of the research sector during this time. You can find our guidance and resources at mrs.org.uk/resources/coronavirus

Post Covid-19 lockdown guidance

We have published a new set of guidelines for returning to work, including face-to-face activity. The guidance builds on the government's safe-working guidance and sets out measures that research practitioners should take to ensure the safety of their staff and the public.

Research participant vulnerability

MRS has produced best-practice guidance and a checklist to help practitioners identify, understand and respond to research participant vulnerabilities effectively and consistently.

Coalition lobby government

A group of membership bodies – representing around 300,000 people, ranging from optometrists and osteopaths to market researchers and accountants – has joined forces to call for financial support for their members, who may have been overlooked for government support.

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.

Speaker presentations

See past presentations in our bank of filmed events

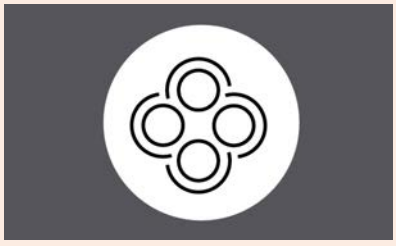
With the current situation, we are providing more online resources for members. If you couldn't make it in person on the night, we've filmed the most popular Speaker Evenings from the past year for you to watch at your leisure. Go to Speaker Evening Presentations in My Membership to view recorded events on: how internet app usage impacts happiness; decoding social and cultural influence; and how online communities can drive digital change.

Mentoring Scheme

Give your career a boost with our specialist Mentoring Scheme

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

Specialist networks



Sign up to a wide range of special interest groups

If you are analytically minded, you can sign up to the ADA network, which holds regular symposia and webinars on the latest data science. If you are under 30 years old, then join &more, the network for young research professionals, to benefit from lively events, peer support and the odd party. Supporting our work in diversity, check out MRSpride, which runs events exploring LBGTQ+ representation in the research sector.

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

Professional webinars

The Power of Data

Join this webinar to understand how the power of big data can significantly impact your advertising strategy and influence campaigns.
9 July

Tell Me a Story

Storytelling is a buzzword gaining cachet in the business world – but what is it, and how can businesses and market researchers use storytelling to their advantage?
24 September

Virtual conferences

FMCG Research Virtual Summit

Join brands, retailers and agencies to hear how novel research approaches are improving cost, agility and quality of insight generation in fast-moving consumer goods.
14 July

Media and Advertising Virtual 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.
21 July

Behavioural Science Virtual Summit

Hear how organisations are using behavioural science to understand how consumers make decisions, and how to develop 'nudges' that encourage behaviour change.
17 September

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

With remote working the new reality for many of us, our conferences and training courses have gone virtual until at least early autumn. We are still providing the same high-quality content, speakers and trainers, but now you can join from the comfort of your home while still interacting with other delegates on the day.

Online courses

Finding the Story in the Data

Find out what comes before the storytelling: that is, how to take information – including market research data – and reliably find the key messages.
8 July

Social Media in Market Research

Build your awareness of how social media and associated techniques, such as online communities, are being used in market research.
9 July

Advanced Thinking in Qualitative Research

This intensive, one-day masterclass is for agency-side and client-side researchers who have a thorough grounding in qualitative research and want new routes to insight.
10 July

Advanced Questionnaire Design

This course takes you through the advanced principles of questionnaire design and how to maximise the impact, engagement and usefulness of questionnaires.
13 July

Infographics and Insight Visualisation

This workshop provides everything you need to know about insight visualisation, including the process of going from raw data to visualisations and the top 10 things that help.
14 July

Presentation Delivery Skills

In this practical workshop, participants will develop and refine their presentation skills, practising in an environment where only constructive feedback is allowed.
15 July

Creative Writing for Researchers

This practical workshop reveals how to apply the fundamentals of creative writing, storytelling and journalism to research presentations, reports, briefs and proposals.
16 July

Introduction to Moderating

This course reveals the theory of moderating, coping with nerves and using stimulus materials through to dealing with difficult respondents.
17 July

Employee Engagement Using Gamification

Use gamification to help staff stay motivated, alleviate stress and work effectively while remote-working during these uncertain times.
20 July

Edwina Dunn **is chair of Starcount and one of the founders of Dunnhumby, later acquired by Tesco. In 2015, she launched non-profit organisation The Female Lead, and is a commissioner at the Geospatial Commission, as well as a non-executive director at the Centre for Data Ethics and Innovation**

1 What has been the most significant development in data science since you co-founded Dunnhumby?

In 2000, when I told the leader of a financial services organisation that data would become strategic, he laughed. Well, not only is it now fundamental, but it is also an essential management and decision-making tool. When we launched Tesco Clubcard, we were the first and only. A year later, Amazon declared its mission statement: 'To be Earth's most customer-centric company.'

2 What is the biggest hurdle organisations face in extracting value from data?

Knowing what you need to understand consumers and behavioural patterns takes time and experience. Data science is all about nudge behaviour – driving new actions and creating automated, intelligent triggers. It's a combination of art and science, which requires knowledge of the way a business works, its quirks and operational limitations. Also, it's important that your data science is able to tell you an ugly truth or two, not just what you want to hear.

3 Is loyalty still important?

Lazy organisations simply use sales to engage consumers, but they have become so widespread that many are now ignored. Consumers want good prices, but they want brands to understand what they love and why they chose them and not another. So brands need to show and earn the loyalty of their customers – not demand loyalty.

4 Which unexplored data sources excite you most?

For years, I've wanted to harness the insight of mobile phones and credit card/financial services. However, the proprietary nature of this data means any value has been highly restricted and slow to emerge. Open-data sources such as social media, by contrast, are global and sensitive to fast-changing trends, revealing consumer triggers that indicate aspiration, belief and purpose, not just behaviour. This data shows future intent, not just 'the past'.

5 How can addressing data biases help with equality?

All data is biased. How it's collected reflects the original purpose, not necessarily the new purpose of analysis and modelling. We should think about the data we need and not always solely from within our organisation. Most data scientists struggle with sparse or bland data, so finding a way to categorise 'all people' is the most balanced and valuable step forward. AI essentially builds in any inherent bias in the data or model, so filling the gaps in the 'ground truth' is a fundamental first step.

6 What role can research play in uncovering unheard stories?

The perfect combination of big data and market research is to use big data to understand behavioural patterns in a way that does not require special intervention or effort, and to use bespoke research to understand why people do what they do. In the past, representative samples have been applied in a way that removes any chance of using subsequent insight in direct communications. In new models, when samples are drawn from within known behavioural segments, significant and practical applications are unleashed.

7 What is the most inspiring story you've heard recently?

The Female Lead is using research to understand what holds back girls and women in life and careers. Instead of asking clichéd questions around 'glass ceilings', we're running hour-long interviews to understand motivation and beliefs through a structured conversation. The response and evident trust from women, combined with clear frustration and appetite for change, is breathtaking. There are big changes afoot as households are thrown together in a work and home-life environment for the first time in decades, and it seems evident that working life and consumerism will probably be redefined. I can't wait to share these new stories.


BREAKING BLUE
A CELLO HEALTH
INSIGHT BUSINESS
We Disrupt.
Our Behavioural Science team is changing the way questions are asked.
We use methods that get behind what people do, beyond what they say.
Delivering actions, not just insights.
Don't you deserve better answers?
Talk to the Behavioural Science team
hello@breakingblueresearch.com
+44 (0) 20 7627 7700
www.breakingblueresearch.com

join the dots

InSites Consulting

We JOINED FORCES

WWW.INSITES-CONSULTING.COM