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Getting it right enough



Though it seemed that the world was on pause for most of this year, in some ways, the past few months can be likened to the fast-forward function on those old-fashioned video players – jumpily skipping ahead, the picture a bit frazzled and pixelated along the way.

Many of the ways we've adapted our work and lives aren't perfect, but they are working, for now at least. I'm sure with the benefit of hindsight, in years to come, we'll think we could have done some things differently, but for now, we need to do the best we can with the information we have available.

My local coffee shop, for example, known for its excellent brunches but slightly cramped seating arrangements, has maintained its high-quality menu but transitioned to takeaway-only, knowing that social distancing wasn't feasible. Whether it is a longer term move or not, it keeps customers well fed, even if from a cardboard box.

Some are well-equipped to deal with the fast-forward. Take Starling Bank, whose chief executive Anne Boden we profile this issue (p16). The digital bank was set up on a strong technological footing and with the aim of putting the needs of customers at the forefront. So, it was able to respond effectively during the pandemic, introducing new measures such as a secondary debit card that could be used by a friend or family member to pay for supplies for those self-isolating.

Research is essential to help us do our best in this blurry period, and so is the ability to admit missteps. While it's important to keep moving, researchers have a key role to play in ensuring that action isn't happening for action's sake,

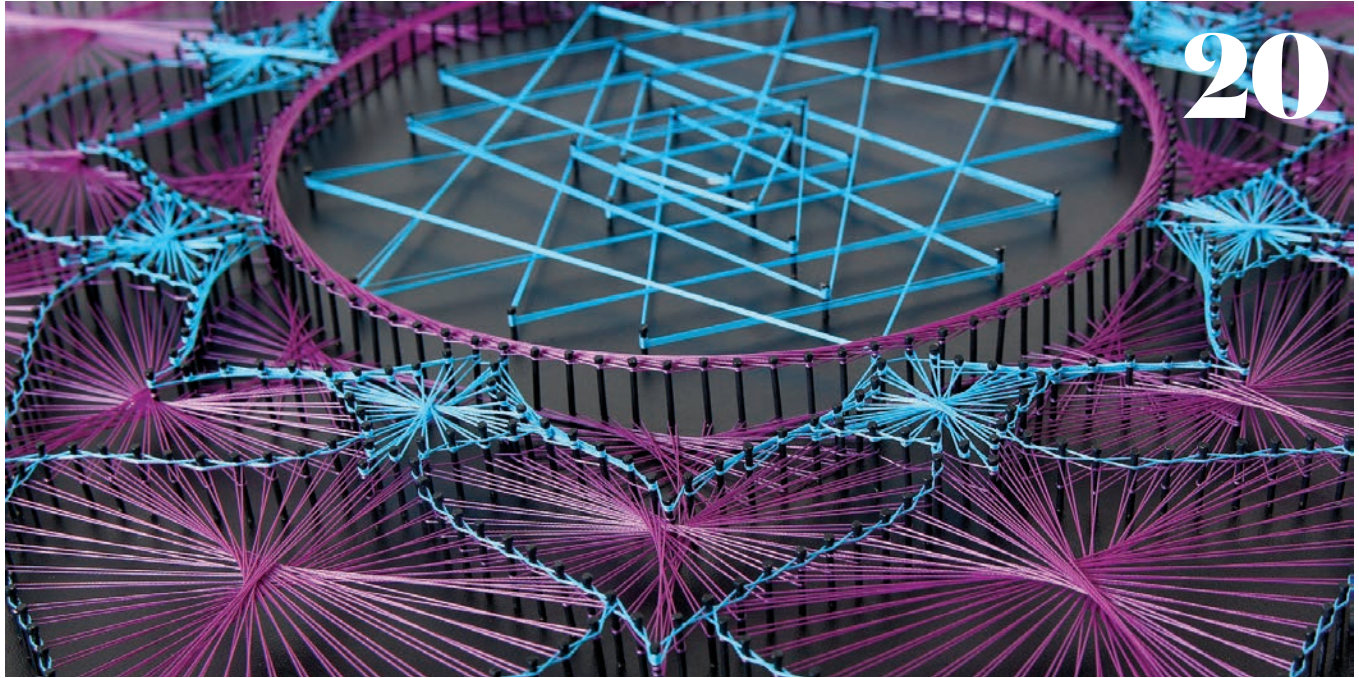
but is rooted in real behaviours, needs and attitudes. As Margaret Heffernan points out (p62), people will forgive decisions that don't work out – that is, if leaders can be transparent and explain how they were made in the first place.

At a time of constantly changing official guidance, when decisions and strategies can be so publicly scrutinised, we can be hamstrung about the right approach, methodology or move to take, or even whether to do anything at all.

In the worst cases, this can become a binary, 'all or nothing' choice. However, perhaps the answer lies not in returning to how things 'used to be', nor in throwing out everything we previously thought. Instead, listening to the evidence and accepting that we may need a new, creative approach.

Organisations can prevent one-dimensional decision-making when they bring in different perspectives – whether that's senior executives having direct conversations with customers in online communities (p20), focusing on a previously neglected audience (p34) or listening to employees through reverse mentoring (p52).

We are in an important period of recovery, but both blind action and decision avoidance in pursuit of perfection can be damaging. In this in-between time, it's safe to admit we won't always get things right. But you can learn, draw on the evidence, keep listening, and change it next time. Perhaps it's not about getting things 100% right but getting it right enough, for now. We can only deal with what's in front of us at any moment, but with good research, at least we can make sure that we put our best foot forward.



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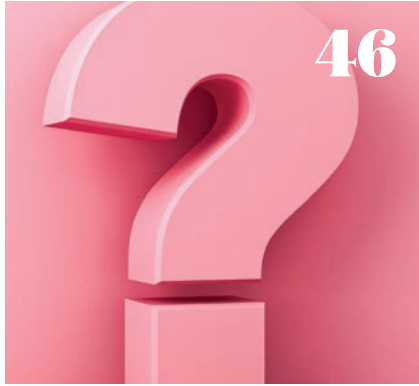
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HAMILTON

24 years old, Bedford

Uses a click and collect service to do her grocery shopping.

Buys "Health" magazine every week.

Never wants any tatoos.

ALEXANDRA

29 years old, London

Is claustrophobic but hides it.
Consumes a lot of Tea.

ALEXIA

26 years old, Birmingham

Loves an adventurous trip.

Commutes as often as possible via bike.

SARAH

32 years old, Crawley

Mostly buys her clothes on the internet.

Is looking to sell her car.

JAMES

32 years old, London

Has just taken out a student loan.

Spends between 11 to 15 hours per week playing video games.

Regularly practices extreme sports.

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The same but different

One of the most valuable contributions consumer research can make is to probe the remarkably different effects on consumer behaviour that may be obtained by presenting the same seemingly objective information in different ways.

In the UK and the US, a car's fuel efficiency is typically presented in miles per gallon. In other words, what distance you may drive for a given unit of fuel. This has significant unintended consequences on consumer perception of fuel efficiency.

It means that, at first glance, replacing a car that does 15 miles to the gallon with one that does 25 seems no more significant a decision than replacing a car that does 50 miles to the gallon with one that does 60. Yet, the first is proportionately far more important than the second – for both the environment and the motorist's wallet.

In other parts of the world, by contrast, the measure used is litres per 100 kilometres; this arguably presents a much more accurate and proportionate portrayal of fuel consumption. Yet we are completely unaware, for the most part, of the profound biasing effects that these two different formulations (distance/fuel versus fuel/distance) may have on our thinking and actions.

When I first bought a sat nav, I very quickly learned that it made very little difference to the estimated time of arrival whether you drove down a motorway at a perfectly legal 68mph or wellied it at 85mph. I noticed that the duration for which I would have to break the speed limit to shave a couple of minutes off my journey was simply too long to be worth the candle. By contrast, there was an enormous difference in arrival time between travelling at 30 and 45mph.

Using the analogy of miles per gallon, it occurred to me that if speedometers had been differently calibrated to display minutes per mile instead of miles per hour, our driving behaviour since the invention of the automobile might have been entirely different. In that parallel universe, James Dean could still be alive.

Here's the thing. We assume numbers are cold and objective, but they aren't. We impose our perception on them, unwittingly. Psychologist Gerd Gigerenzer has written wonderfully about this, pointing out that natural frequencies are much preferred to percentages when presenting probabilities. He has also found that



many doctors will nod at being told that a virology test is “99.7% accurate” without asking what the false-positive rate may be. And he recommends that, in presenting rows of decimals, we must include all the values, even if they are zeroes – such as 1.278888 alongside 1.450000, not 1.45 – lest the shorter number will seem to our brains to be smaller.

How many markets, I wonder, are ruined by the fatuous and unmotivating metrics that are presented supposedly to aid objective comparison? The APR interest rate looks objective enough, but it woefully underplays the compounding effect, hence reducing the perceived cost of borrowing – and making saving look less attractive than it is.

Other sectors are just as confusing. Solar power is one area where, unless you have a degree in physics, you haven't got a clue what on earth you're getting for your money. The cost of panels is normally stated in terms of the number of years it takes them to repay their purchase cost. This looks bad. But expressed as an 8% annual return, it would look better than any savings product on the market.

Electric cars are sometimes ranked by the amount of time it takes to charge a battery from flat to full. Yet how often do we drive 300 miles on two consecutive days? For most of us, it's perhaps twice a year or even less. The norm has been set around a completely abnormal behaviour.

The first lesson of marketing, in many ways, is that people are not much influenced by objective reality, hence research that assumes objective perception is always dangerous. Respondents may be reacting to the presentation of the facts, not the facts themselves.

Some time ago, bird researchers looked at parrot behaviour by showing the birds photographs of various types of fruit. The parrots' reactions seemed bizarre, until, that is, someone pointed out that the photographs were – as all printed and televised pictures are – optimised for human colour perception. A photograph of a banana that looks yellow to a human might therefore look green to a parrot.

Human perception is like parrot vision. We don't see what others think we should. And don't get me started on pricing research. As anyone who's bought overpriced tat at an airport shop can attest, the same thing can seem extraordinarily expensive or astoundingly cheap, depending on what mood you are in.

●
“We assume numbers are cold and objective, but they aren't. We impose our perception on them, unwittingly”
 ●

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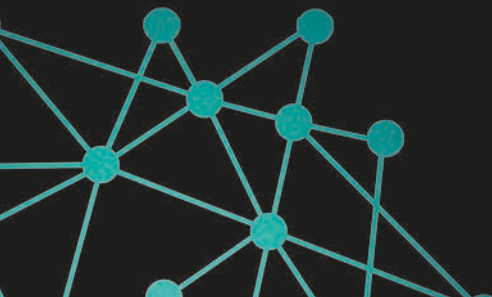
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 “Gender equality is not just a matter of fairness but a business imperative. The case is compelling – more women as key decision-makers will deliver higher dividends for a company and its shareholders.”
 ●

(p10)

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Increasing female representation on the boards of Australian listed companies led to a 4.9% increase (\$78.5m) in market value
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(p10)

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75% of people in the UK watch crowdless football matches with artificial crowd sounds switched on
 ●

(p14)

●
 77% of Chinese people would like to buy more Chinese brands to show support after the pandemic
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(p15)

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 “Covid-19 provided an opportunity for many leading Chinese brands to outperform their western counterparts as they have strength in supply chain and consumer trust.”
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(p15)

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“For young people living in the UK and across Africa, there is widespread awareness of and sensitivity to the UK’s position as a former colonial power.”
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(p12)

Proof of concept

Research by Australia's Bankwest Curtin Economics Centre has suggested a causal relationship between increased female leadership and businesses' financial performance.

By Rebecca Cassells

It could be the most compelling case yet for Australian companies to raise their game when it comes to gender equality and women in leadership: the data shows it literally pays to have women at the top.

The Bankwest Curtin Economics Centre (BCEC) has analysed company data collected by the Workplace Gender Equality Agency (WGEA) and discovered that the glass ceiling that prevents women from holding high-level jobs is also holding back Australian companies and the return on investment for shareholders.

Having more women in senior leadership roles, sitting on boards and as chief executives leads to better profitability, productivity and performance for companies, the analysis found.

According to our research, if an Australian ASX-listed company increased the number of women in key leadership roles by 10 percentage points, it would enjoy a significant boost – a 6.6% increase in its market value, worth the equivalent of \$104.7m.

The research also shows that an increase in female representation on the boards of Australian ASX-listed companies leads to a 4.9% increase (\$78.5m) in market value – while a female chief executive will mean a company is 12.9% more likely to outperform its rivals across

three or more standard company performance indicators, including dividend yield.

How can we prove that women are the driving force?

Several critical steps need to be taken when trying to identify a causal relationship between female representation and company performance. To do this, we use multivariate regression, including two-way panel fixed effects applied to longitudinal data to draw out a causal inference. We also incorporate a number of controls and other steps in our methodology, to make sure we are able to isolate the impact women in senior leadership are having on company performance.

We control for other company characteristics that also influence



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“Women tend to work more collaboratively and run businesses more democratically... leading to enhanced decision-making”
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business performance, such as the size of the company and the sector in which it operates. We also make sure intrinsic differences between individual companies' approaches and attitudes towards gender diversity in leadership are controlled for, and we strip away business-cycle effects that impact on company performance across sectors of the economy.

We make sure a company's performance is compared against benchmarks within its own industry sector, knowing that firms often operate in sectors that differ systematically, both in terms of the share of women in leadership and in

business performance expectations. Most important is the requirement to relate prior changes in female representation to subsequent changes in business outcomes.

These steps go to the heart of the strategy to identify a causal relationship between increasing women in leadership and company performance – and all are made possible because the WGEA reporting data is longitudinal and we can observe the same company over time. This is one of the most stringent modelling approaches that can be applied.

Why do gender-diverse companies perform better?

Greater representation of women in senior leadership positions brings a greater diversity of thought and strategy when targeting business growth and boosting value for shareholders. Increasing the number of women in senior leadership positions effectively expands the 'brainpower' available, leading to a wider array of solutions to problems and deeper debates.

Women also tend to work more collaboratively and run businesses more democratically. This management style promotes sharing of key information and greater collaboration, leading to enhanced decision-making and better business operations.

A 2015 study questioned whether the global financial crisis would have occurred if Lehman Brothers had been Lehman Sisters. By examining gender diversity at 300 large US banks over the global financial crisis, they found that banks with more gender diversity performed better, because of female directors' stakeholder-orientation and strong corporate social responsibility (CSR) measures.

Around 30% of board positions in Australian companies are now held by women. However, nearly 30% of Australian companies still have no female

Female representation had the following impact, according to this study:

- Appointing a female chief executive increased a company's value 5% and likelihood of outperforming of sector benchmarks by 12.9%
- Raising female board representation increased value by 4.9% and outperformance by 6%
- Increasing the number of women in management positions resulted in a company's value rising 6.6% and outperformance by 5.8%

Both measures fell when female representation was reduced at board or management levels.

board representation, and a similar share have no women in senior management.

Policies are in place to enforce quotas or targets in women's board representation in many countries across the world, with 30% or 33% as the baseline. Some countries have taken stronger action, legislating for a share of at least 40%. Lifting the proportion of women in leadership can only happen if companies focus on the goal of achieving gender equity in progression and commit to specific actions to drive change.

Our research findings demonstrate clearly that gender equality is not just a matter of fairness, but also a business imperative. More women as key decision-makers will deliver higher dividends for a company and its shareholders.

● **Rebecca Cassells is deputy director at the Bankwest Curtin Economics Centre**

In late 2019, the British Council tasked M&C Saatchi World Services with identifying dominant and emerging narratives about the UK across the African continent, and about the continent in the UK, at a historical moment when UK-African relations are being radically redefined.

The findings of the research were designed to inform the British Council's five-year New Narratives programme. This aims to contribute to changing reciprocal perceptions of the countries of Africa and the UK, to stimulate new understanding and unlock connections and collaborations for mutual benefit.

Three challenges defined our approach to the research. First, an early review highlighted the multiple, often conflicting, and vague uses of the term 'narrative'. In response, we focused on the touchpoints that influence how young people construct stories about the other place. Second, recognising the influence of imagery on young people's perceptions, we integrated visual data and stimulus throughout the research design. Third, imagery of the UK across Africa was not as abundant as imagery of Africa in the UK. Consequently, we commissioned narrative scouts in five African countries to source

Our minds' eye

In a post-Brexit UK, and to redefine UK-African relations, it is imperative to listen to the voices of young people. By Tom Curran

pictures, videos and other visual materials of the UK in their respective countries.

Our research design included: a historical review of the narrative trajectories and cultural and socio-political themes dominating UK-African relations from 1500 to the present; a semiotic analysis drawing on thousands of images in popular culture and gathered by local narrative scouts and young people across the two regions; and drawings of young people from the other place, gathered in 32 workshops with 256 people aged 18-35.

We convened the youth workshops in five UK cities – London, Manchester, Edinburgh, Cardiff, and Belfast – and cities in eight African countries: Addis Ababa, Algiers, Casablanca, Cairo, Johannesburg, Lagos, Nairobi, and Yaoundé.

For young people living in the UK and across Africa, there is widespread awareness of, and sensitivity to, the UK's position as a former colonial power, and as potentially complicit in various forms of neo-colonialism. Young black British people and Africans are especially emphatic in their interpretation of the UK's colonial legacy as one of exploitation and destabilisation. Non-black young people in the UK, meanwhile, report being unsure about how welcome they would be as visitors to African countries and are highly sensitive to appearing as neo-colonisers.

While young people in the UK regard the UK as a significant provider of aid to African countries, this aspect of UK-African relations is coming under fire for reasons including a perceived lack of impact after decades of international development efforts. There is also an argument that giving aid allows the UK to present itself publicly as a saviour of a needy Africa, while continuing to exploit the continent.

In terms of what the other place can offer them, young people in the UK perceive Africa as a tourist destination only. Indeed, even when explicitly asked to nominate a country or city they would consider studying or working in for six months, the majority could only think about travelling for a holiday. The situation is reversed for young people living in African countries, who see the UK

as a gateway to opportunity in terms of work and study.

When it comes to the prospect of travelling to the other place, safety concerns are expressed on both sides. For young people in the UK, decades of stories in the news media and by charities highlighting famine, drought, disease, inequality and instability have contributed to a perception of African countries as impoverished, dangerous, and lagging behind the rest of the world socio-economically and in terms of human rights. For young people in African countries, concerns about British racism and elitism are widespread, with notable examples cited including prejudice and discrimination in the English Premier League, and the treatment of Meghan, Duchess of Sussex, by the royal family.

When asked to imagine each other, young people living in African countries commonly see their UK peers as facing no worries or challenges, whereas, from the UK perspective, the experiences of their peers in African countries are marked by problems of poverty, inequality and health. Despite these differences, however, young people in both places share a common set of youth-centric values, hopes and aspirations, including commitment to family, honesty and respect, and an ambition for professional and economic success.

There is no doubt that the 'pictures in their heads' that young people living in the countries of Africa and the UK have of each other – and of each other's countries – are heavily influenced by their shared history and by popular culture. Navigating the waters of new trade relations with other countries and trading blocs should take account of the multiplicity of narratives informing these pictures. In general, but especially in the context of a post-Brexit UK and the challenge to redefine UK-African relations, listening to the voices of young people in both places is imperative for this to be achieved in a sustainable and productive manner.

● **Tom Curran is senior research executive at M&C Saatchi World Services**

The research examined four categories of narrative touchpoints:

DIRECT TOUCHPOINTS are experiences where young people are in contact with people from the other place, including family and friends who live there, or settings, such as universities, that serve as meeting points.

BRIDGING TOUCHPOINTS are formats or forums, including music and sports events, involving people from both places. For example, in the English Premier League, teams are from the UK, but many of the leading players are from African countries.

MEDIATED TOUCHPOINTS are media platforms or formats produced to represent and communicate content about the other place, including film, TV, marketing, advertising and news media.

ICONIC TOUCHPOINTS are individuals, institutions, places, monuments and structures, rituals and customs, and brands that are intrinsically identified with either place. Examples included the British royal family, William Shakespeare and Big Ben for the UK; Nelson Mandela, Robert Mugabe, the Pyramids and Kilimanjaro for African countries.

Playing in silence

While football returned to stadiums as restrictions eased, supporters could not. How did empty grounds impact the fan experience? By Liam Kay

The celebrations over a last-minute winner. The roar of the crowd as a red card is shown or a penalty appeal is turned down. All are intrinsic parts of the football experience, and all were put on hold this year.

Europe's top five leagues were forced to stop matches in March, when France, Germany, England, Italy and Spain all implemented restrictions. Of those competitions, only France did not restart the 2019/20 season. The rest opted for crowdless stadiums, with games played behind closed doors and matches broadcast on television with artificial crowd noise.

Initially, it seems, fans were not wholly in favour of football's return. In May, a YouGov poll of the general population found that 73% did not feel it would boost morale in the UK generally.

Social listening firm Synthesio, meanwhile, analysed what fans were saying online about football's return before and during the reopening of the major leagues. Sentiment about the Premier League restarting was negative because of concerns about spreading the virus through large public events (see boxout).

The Football Association (FA) has been researching sentiment about football's return using a fans' community panel

called Pitcheside, which has 2,500 participants. A tracker, called the Fan-o-meter, runs monthly with 400 people and a CRM database of fans who are members of the England Supporters' Club and England Supporters' Travel Club.

Despite the lack of atmosphere, most fans embraced crowdless football. The FA research found that only 10% to 15% of supporters were less likely to tune in when matches were behind closed doors, offset by a 30% rise in viewership reported by broadcasters such as Sky. One match shown on the BBC during the Premier League's restart – Southampton v Manchester City – broke the Premier League viewing record, with 5.7 million viewers.

Ross Antrobus, head of behavioural insights and business analytics at The FA, says most fans preferred artificial crowd noise when watching matches, rather than the sound of an empty stadium.

"We know from our broadcast and survey data that 75% watch with artificial crowd sounds turned on," he says. "People who watch with the artificial sound on watch for 13 minutes longer on average. If you look at people who initially started watching without artificial sound, 55% of those switched to using virtual crowd noise."

The FA has also tracked mood and attitudes among fans, finding that stress and boredom levels started falling in June, as restrictions began to ease in the UK, but also that the return of football was broadly welcomed.

"We wanted to get people's views on

whether football is good for the mood of the nation. Football fans overwhelmingly thought that was the case – and, even among the general public, only one in five saw football coming back as having the potential to undermine lockdown," Antrobus says.

"It was probably helped by the fact that English football was not first back to market – the German Bundesliga helped pave the way in people's minds, to show football could return safely."

The FA surveyed 3,000 people who had attended events at Wembley Stadium in the 18 months before Covid-19, to work out how best to return fans to stadiums. A trial with 2,500 fans has already taken place at Brighton's Amex stadium, and there will be others at Wembley to pave the way for clubs of all sizes to return to a more traditional environment for games. The research will be used to inform the measures that are tested and subsequently recommended to clubs, to help them generate revenue from crowds again. Media value assessments for sponsors and partners are also being carried out.

"We are going to show the survey participants what we might be doing in terms of queuing, turnstiles, cashless interactions and digital ticketing, social distancing in seats and making the most of social bubbles," Antrobus explains.

"All of the measures will mean that getting into the stadium and into your seat will be a more protracted process. We need to make sure fans are aware of that, and ensure they have the best experience they can."

England v Germany

Synthesio used a social-listening dashboard to analyse what people were saying online, between 17 April and 17 July, about football's return to matches behind closed doors:

- For the German Bundesliga, 28% of the posts online were negative, while 22% were positive.
- For the English Premier League, it was 17% negative and 3% positive.

Made in China?

Chinese brands have been increasing in popularity in the country in recent years. Could stronger cultural awareness and the pandemic boost domestic consumption further? By Katie McQuater

As the first country to be hit by Covid-19, China is also the first to emerge from it. While the virus hit consumption, it has also accelerated a trend towards the local, and many domestic brands have flourished in the world's second-largest economy.

In the luxury market, for example, prior to the pandemic, two-thirds of Chinese purchases were made overseas – according to consultancy Bain & Company – either through people travelling abroad or buying from re-sellers in a practice known as 'daigou'.

However, limitations on international travel this year have led to people spending more domestically, accelerating an existing trend: premium products have become more affordable in China since the government cut value-added tax in 2018.

In June, New York insight agency Spark conducted mobile-based ethnography with Shanghai-based women who buy luxury products. The research found signs of more pride and interest in local brands and references to a cultural renaissance.

Kantar Worldpanel reported that Chinese brands performed more strongly overall than global brands during the outbreak of the pandemic, according to Jason Yu, managing director of Worldpanel in China. This is in contrast to previous performance; while domestic brands have been growing consistently in recent years, multinationals grew faster in 2019 as they became more adaptive to the local market.

"Covid-19 provided a unique opportunity for many leading Chinese brands to outperform their western counterparts as they have strength in supply chain and consumer trust," says Yu.

Local brands also tend to be more agile and react faster to emerging market trends – particularly in the e-commerce space – as well being more flexible in terms of price ranges, explains Yu.

Increased interest in Chinese products is not limited to the affordable, according

to Keiyou Wang, research director for lifestyle and auto at Mintel, who points to the rise of premium domestic brands including Huawei and Xiaomi.

Perception of stronger cultural nous could be helping to drive interest in domestic brands. A revival of Chinese culture is seen in the term 'guochao', used to describe brands incorporating traditional Chinese style, which has emerged across categories over the past few years.

"Based on Mintel survey data, 65% of consumers think premium domestic brands do better than foreign brands of the same grade in cultural characteristics. Chinese premium brands are benefiting from a combination of cultural contribution and social responsibility marketing," says Wang.

Yu adds: "Younger consumers today have more confidence in Chinese brands that understand them and there is a growing patriotic feeling and pride in 'buying China'."

The beauty sector offers evidence of a shift towards the homegrown, with a number of Chinese brands, such as cosmetics company Perfect Diary, competing against the large global multinationals which have long dominated the market.

A report published by Chinese lifestyle platform Little Red Book found that while Western beauty brands still dominated the app, the number of views related to domestic brands increased by 66% between January and June this year.

China's middle class has been growing for years. However, no longer are people merely 'trading up' with expensive items, according to Yu – they are also becoming more rational, shown by the growth in both luxury and affordable sectors.

It's unclear whether the middle class will be able to continue growing their spending power, as many have become more careful due to the pandemic. However, Yu adds: "Maybe people want to buy a local brand that offers the same quality at a much lower price, but they do demand a quality life. The aspiration will stay, and that will be a more permanent driving force of the consumer market in China."

51% of Chinese respondents were 'far more in favour' of buying goods and services that had been produced in their own country (Kantar's Covid-19 barometer, April)

60% of consumers aged 21-34 reported buying an item from a Chinese luxury brand during the first six months of 2020 (Agility Research & Strategy, August)

77% would like to buy more Chinese brands to show support after the outbreak (Mintel tracker, April)

High-flyer

As founder and chief executive of Starling Bank, Anne Boden counts on listening to customers as the bank evolves. She talks about building a new type of bank with Jane Simms

The starling is a sociable, adaptable, friendly and supportive bird. It also works as part of a team to make something as complex as a murmuration – a shifting, swooping wave of sometimes thousands of birds – look beautifully simple.

It explains why Anne Boden and her team chose the name Starling for the digital bank she established in 2014, but it is also not a bad descriptor of Boden herself – the diminutive Welsh woman with the wide smile who took on the big banks with a customer-focused offering based on 30 years' close observation of what was wrong with the traditional industry.

We meet over Zoom, but her enthusiasm, warmth, integrity and determination to change things for the better shine through. Our conversation begins with her excitement about opening the Cardiff office (there were already offices in London and Southampton) just before lockdown. "Carol Vorderman [the TV personality] was coming to the opening ceremony, but we had to cancel it," she says, ruefully.

In February, Starling Bank launched its first TV ad aimed at businesses. It follows the journey of a small business owner sitting in her home office, which takes off, like a helicopter, with the help of the Starling app. As the 'business' gains height, it is struck by lightning, and she wrestles with the controls before breaking through the clouds to safety, accompanied by the end line 'Starling Bank: helping business fly'.

The ad was prescient. Unbelievable though it may seem now, few of us anticipated the bolt from the blue, and associated turbulence, represented by the global pandemic. Starling has kept the implicit promise in its ad: it has lent almost £790m to small and medium-sized businesses (SMEs) under the government-backed Coronavirus Business Interruption Loan Scheme and Bounce Back Loan Scheme.

A career banker (joining Lloyds Bank as a graduate trainee in 1981 and, most recently, chief operating officer for Allied Irish Banks), Boden was determined to put customers front and centre of Starling from the outset. That meant no hidden fees or charges, 24/7 customer service, no – or low – charges on overseas card spending and ATM withdrawals, and features that allow customers to stay in control, such as being able to freeze your card if you lose it.

Starling was already doing well before the current crisis. By the end of its financial year in November 2019, 926,000 retail accounts

and 82,000 business and sole-trader accounts had been opened, and the bank held a little more than £1bn on deposit. By August 2020, those account numbers had risen to more than 1.25m and almost 200,000 respectively – plus almost 90,000 euro and US dollar accounts – and Starling held more than £3bn on deposit. Across its range, the bank is adding a new account every 35 seconds, making it the fastest-growing SME bank in Europe.

While competitors have been furloughing or laying off staff, cutting executive pay, closing business lines and setting aside huge sums to cover expected losses, Starling has been hiring, raising money (more than £100m from existing investors this year) and continuing to develop new product lines. What's the secret of its success?

"We are a very agile organisation," says Boden, her face breaking into its trademark smile. "We are still very entrepreneurial; we see every challenge as an opportunity. We didn't go into lockdown and stop, or just carry on with the products we were already working on. We thought very carefully about what our customers needed and responded accordingly. You have to be relevant at any particular point in time."

Firm foundations

Unlike many banks, Starling has in-house engineering teams and its own core banking software running in the public cloud infrastructure.

Boden has been fascinated by technology since she studied computer science at Swansea University, and was frustrated by how clunky the technology was in the banks she worked in – and how resistant those organisations were to change. "It took a long time to put the things in place that would allow Starling to be the customer-focused bank I wanted it to be, but it's paid off," she says. "It meant that, during the crisis, we could dip into our bank of features and pull out the components that we could put together to create a relevant product."

For example, Starling launched a second debit card attached to the customer's account for use by trusted friends, family or carers, to help those who were self-isolating to get supplies; and cheque imaging, so customers could pay in cheques from home.

By the time Boden left Allied Irish – when the reputation of banking, rocked by scandals, government bailouts and punitive customer penalties, was at rock bottom – she was "ashamed to be a banker". Unable to fix a system she perceived as broken, she

Anne Boden's idea for a new bank was seen by some as 'too audacious'



determined to set up a new bank. But people backed away from her at drinks parties when she told them her plan, and the two years she spent raising money was, she admits, “really tough”. She even sold her house to help fund the launch. “My plan was a bit too audacious and ambitious for people to be interested, to be honest,” she says.

Her fortunes changed when she was approached by billionaire fund manager Harald McPike, who flew her to the Bahamas and spent three days quizzing her about her plans on his yacht. Boden expected to be there for only a few hours, but the trip paid off; she'd hoped to raise £3m, but McPike has invested more than £83m so far.

Starling's retail customers are slightly older and less metropolitan than those of rivals Monzo and Revolut, and it has a strong SME base – particularly micro-businesses and sole traders. “In lockdown, spending on public transport, city coffees and lunches fell, whereas families around the country carried on doing the supermarket shop and, in time, filling up the car with petrol,” says

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“The world is now run on the smartphone and people are very capable. I don't think there's any need whatsoever to hold back”
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Boden. Again, targeting such demographics seems like a far-sighted strategy. On the contrary, says Boden; customers chose Starling.

“I don't think there was a point in time where we

decided that particular demographic was our target – nor did we sit down and decide what the brand should look like,” she says. “Our brand and culture emerged, based on what we wanted to do in response to what we believed customers needed, and that was naturally attractive to certain types of people right across the UK.”

The Starling app helps customers manage their cash flow, and track their income and spending, but Boden has said she wants to “push the boundaries” of what customers can do with the app. Does it risk taking customers further or faster than they feel comfortable with?

“Our customers are very techy, irrespective of their age,” she says. “We have customers in their nineties. The world is now run on the smartphone and people are very capable. I don't think there's any need whatsoever to hold back. Because we love technology and

● Profile

Boden was made an MBE in 2018 for services to fintech



building things, when our customers ask us to do more – as they do constantly – we can respond. I think companies underestimate customers’ technological abilities.”

Starling knows what its customers want because “they talk to us a lot”, says Boden. “In a typical day, I will get 20 or 30 emails from customers. For example, a customer told me recently that, because she has small hands, she uses a small phone, and on our app display, some of the buttons are too near to each other. So, we can change that.”

Boden has always been visible, believing that, as chief executive of a bank, she should be “accessible” and speak to customers on social media. She is proud of the customer-focused experience she has been at pains to create – and that has won awards, including Best British Bank for a third consecutive year at the British Bank Awards in early March. She herself was made an MBE in June 2018 for services to fintech.

So, the opprobrium the bank attracted from some quarters over the Bounce Back Loans was painful; there was a vicious response on Twitter when it turned down some loan applications and

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“The whole BLM issue has been an eye-opener for us. While our employee base is diverse, we are not getting black people to the top”
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temporarily stopped sole traders opening new accounts because it was overwhelmed by demand.

“Personally, the negative stuff was horrible,” Boden admits.

However, it was a very small,

but vocal, minority who complained, she says.

The urgency of the need from SMEs meant that Starling had to launch its government-backed lending practically from a standing start. “We were upfront about the fact that we might need to make adjustments as we go,” says Boden. “But you can’t hide. You have to take the good with the bad.”

The government guarantee protects the bank, not the borrower, but the banks will be required to chase the loans before going to the Treasury – which is unlikely to play well with the customers concerned. “I think certain bodies have been encouraging people to take out loans without pointing out that they will have to repay them; this is not free money,” says Boden.

“As a result, I think there will be a backlash against the banking industry, and we are all working with the Treasury to ensure the right support mechanisms are there for customers over the next

couple of years, and to figure out what this recovery process is going to be. We have to make sure that those customers are treated fairly.”

Redressing the balance

Boden is also proud of the bank's record on gender diversity, among both staff and customers: half the executive team and one-third of the board are women. As a woman in two worlds historically dominated by men – finance and technology – gender equality is close to Boden's heart. Her own experience has taught her that if you don't 'fit in', you have to “really stand out”.

Starling has conducted research that aims to challenge gender stereotypes around financial habits. For example, its #makemoneyequal campaign examined how differently the media speaks to men and women about money.

In June, it published a report on couples' household finances, in conjunction with The Fawcett Society. It found that, although women are as knowledgeable about finances as men, and increasingly financially independent, they continue to shoulder the burden of labour in the household, with damaging effects on their wellbeing – something that has only been magnified during the current crisis. Starling and The Fawcett Society have called on the government to help redress the balance by making all jobs flexible, as far as practically possible, giving fathers longer parental leave, and protecting women's pension contributions during maternity leave.

“Diversity is what we are,” says Boden, yet she admits that Starling's focus has been on gender equality rather than racial equality – and racial inequality has been thrown into sharp relief by the Black Lives Matter (BLM) movement.

“I feel very comfortable being very vocal about gender equality,” she says. “When it comes to racial inequalities, I feel that neither I nor the other leaders here have the right to talk, because we haven't felt what it is like to be discriminated against in this way.”

It's a more honest response than that of some businesses, which have raced to express support, apparently blind to the stark inequalities within their own organisations. A voracious reader, Boden is educating herself “by working my way through my reading list”.

Research shows that black people are severely disadvantaged when it comes to raising finance – to start a business, for example. Is this a potential area of research for Starling? “Yes,” says Boden, though she suggests they will take a considered approach.

“The whole BLM issue has been an eye-opener for us and, as an organisation, we are learning. Even here, while our employee base is diverse, we are not getting black people to the top of the organisation.”

You sense she will take the issue very seriously because she has a keen sense of fairness – at work, among customers, and in society as a whole. The atmosphere at Starling is informal and egalitarian, informed, perhaps, by Boden's own background: her father was a steelworker and her mother worked in a department store.

One of Boden's proudest achievements this year was awarding free shares, worth around £3,000 per person, to all employees.

“They deserve no less,” she wrote in her annual ‘CEO letter’ to staff,

customers and investors in August. Boden, employees and ex-employees – and an employee benefits trust – now own 24% of the business.

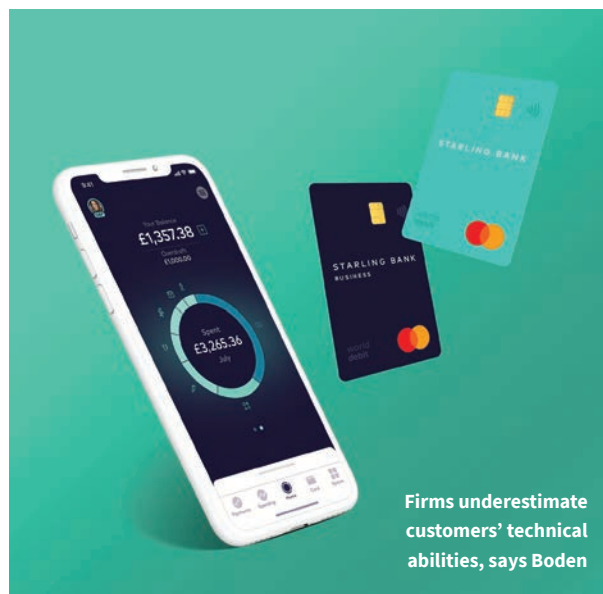
In August, Starling Bank came just behind Monzo at the top of the biannual customer satisfaction poll by Ipsos Mori on behalf of the Competition and Markets Authority. The survey, of nearly 20,000 retail customers of 19 participating banks, ranked the bank a close second in terms of overall service quality – ahead of long-time customer hero First Direct. Starling took pole position, however, in overdraft services.

“It's been the most wonderful journey so far, with lots of ups and downs, and some horrific times, but it is very rewarding,” says Boden. “Not many people get the opportunity to reinvent something. I spent a lot of time working out what was wrong with the industry, and this is my opportunity to do it right. But it's a work in progress.”

She believes that the pandemic has accelerated people's changing expectations of business – they want them to be more responsive and responsible and, at least until we get a vaccine, more digital. “We can be in the vanguard of that, which is exciting,” she says, but warns against complacency. “When businesses take their eye off the ball, things go wrong. We have to keep listening carefully to our customers to make sure we continue to evolve.”

Starling expects to break even this year and is pursuing international ambitions. It is negotiating for a licence in Ireland, from where it hopes to launch a European operation early next year. Competitors should watch out: another feature of the starling is that it arrives in large numbers in each new territory and displaces the old guard.

Boden credits the whole UK banking industry with working very hard to “do what the chancellor asked us to do and get money into the hands of businesses to help them through this crisis”. Six years ago, she was ashamed to be banker. How does she feel now? She grins: “I'm very, very proud to be a banker today.”



Firms underestimate customers' technical abilities, says Boden

A sense of community





Online research communities offer businesses a means of getting closer to their customers, generating insight and validating research findings – but they can also foster connection and empathy in uncertain times.

Bronwen Morgan reports

23 March 2020 is a date that few British adults will forget. It was the day when, after weeks of uncertainty, the prime minister instructed us to stay in our homes to slow the spread of Covid-19.

For many, this was the point at which the threat of the pandemic suddenly became real on a human level. The business world had already been deeply impacted, however; most offices had closed, international travel was heavily restricted, and revenue was hanging in the balance. The future looked uncertain, and especially so for qualitative researchers, for whom travel and face-to-face meetings are lifeblood.

The restriction on reaching people came at a time when businesses, arguably, needed insight more than ever. How were customers feeling in these extraordinary times? What support did they need? How should businesses respond? The situation was unprecedented – there was no business model from which to work.

According to Graeme Lawrence, managing partner at InSites Consulting (online community specialist Join the Dots was acquired by InSites Consulting in summer 2019), most of his clients took one of two courses of action: some put an immediate stop to insight work, as budgets and business became unpredictable; others immediately doubled down on their efforts to understand how customers were feeling.

Once the initial shock had passed, says Lawrence, most settled on a need to understand what their customers were thinking and feeling, and online research communities became one of the key mechanisms for clients to get close to their audience.

“Across the spectrum, whether it’s organisations that have found Covid-19 tough – such as travel, tourism and hospitality sectors – or others, such as consumer healthcare and some FMCG organisations, they have all turned their heads to this idea of consumer empathy and consumer connection,” says

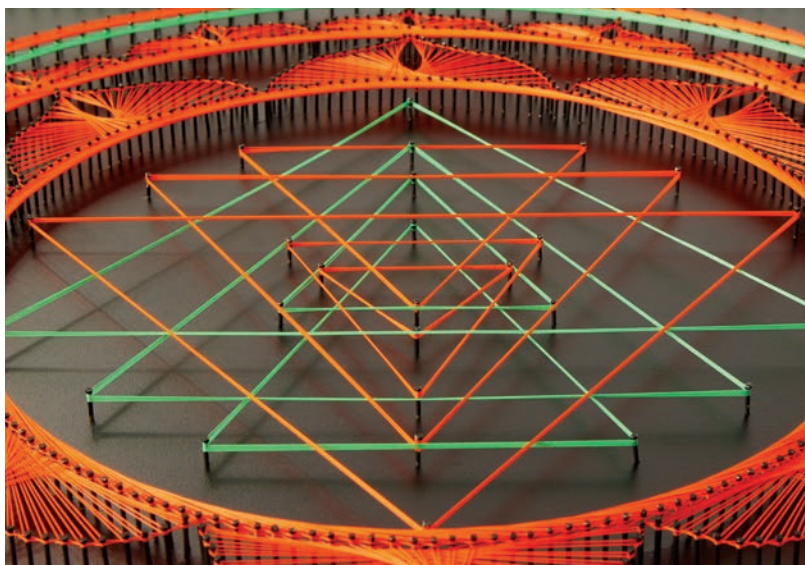
Lawrence. “Covid-19 has put an injection into what was already a bit of a trend around consumer-centricity. It’s added an extra catalyst.”

A return to form

For Lawrence, this emphasis marks a return to the core value of online communities. When they first emerged, in around 2008/09, online communities were representative of the Web 2.0 movement, he says – the move away from the internet being a very flat, one-directional place, to a more participative one. Online communities embraced the collaborative nature of this new space and, in doing so, took the approach to a different, more ethnographic place.

Then the financial crash and the subsequent recession changed the rhythm of what was building, and cost-effectiveness became the approach’s appeal.

“That upset me, because that participative, collaborative quality – that window into people’s lives – got knocked to the side slightly by this platform being quick and cheap,” Lawrence says.





Advancements in technology, plus a vast increase in the amount of time people were spending online, only served to make online communities even quicker and cheaper. However, the set of circumstances established by the pandemic, globally, has presented an opportunity for the customer-closeness benefits of communities to return to the fore.

“What Covid-19 has done, I think, is make a lot of organisations ask themselves if they’re really that well connected – and, if they’re not, how they are going to come out the other side of this,” says Lawrence.

In broad terms, an online research community is a digital platform where people are invited to interact on a variety of tasks over a period of time, which could be anywhere between one week and a few years. The size of the community can range from 10 people to thousands, though a typical long-term community, says Lawrence, has between 1,000 and 10,000 members. These members are sourced either from a brand’s existing customer database or recruited from a panel based on certain criteria – having a pet, for example. (See boxout, ‘Managing a successful online community’.)

Typically, InSites Consulting’s communities include ‘residents’ (a core target audience that is always present in the community) and ‘visitors’ (sub-targets recruited for specific studies).

One of the company’s clients, confectionery giant Mondelez, set up its community in 2017, when a change of leadership led to a push to put the consumer back at the heart of its business. Malakai De-Morgan, shopper insights manager, confectionery, Northern Europe at Mondelez, says the business saw a community as the perfect way to keep tabs on the UK’s ‘snackers’. It is now one of the business’s most-used insight tools.

“The richness and number of reactions we can get,

Managing a successful online community

In May 2020, Explain Market Research brought together nine organisations – including clients with customer, employee and stakeholder online communities – in a virtual environment, to share best practice and identify the most important ingredients in building and managing a successful online community.

The findings from its report, *Online communities: for research and engagement*, can be summarised across six key areas:

Content: content should be weekly, moderation daily, and always close the loop to make engagement meaningful

Recruitment: define your recruitment key performance indicators (KPIs) and strategy, decide on recruitment channels, and ensure the strategy is always ‘on’

Rewards: do not assume that one size fits all; make rewards bespoke to the member

Moderation: a moderator should let

conversation between members flow naturally and provide the space to allow that to happen

Embedding the community: always think about the online community when working in and on the business. What is the latest news, what can be shared, and what is important to report back to colleagues?

KPIs: be clear what you would like to report on at the start – what is important to your organisation – and set the KPIs to track your progress.

very quickly and very cost-effectively, means that it's our first port of call for testing hypotheses," says De-Morgan. "Whether it's new products or new categorisations, or things that we might want to invest in in the future, we'll use the community to gauge a reaction to potential ideas."

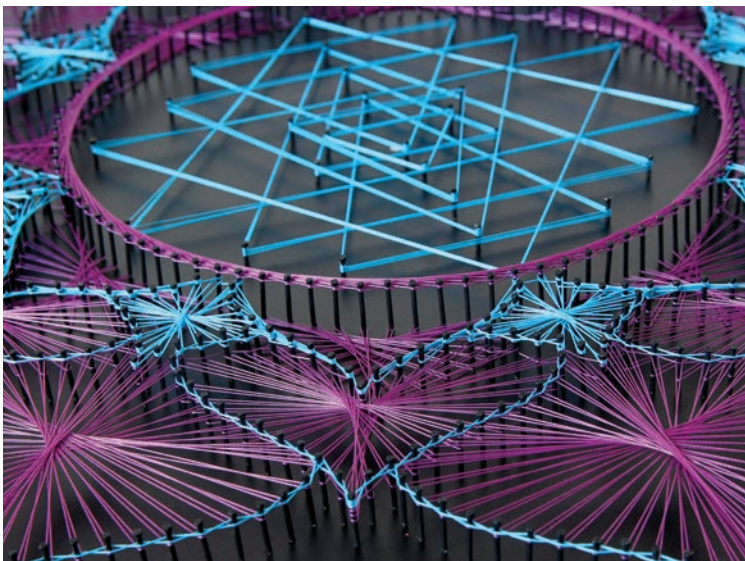
In the current circumstances, the community is taking on greater importance. Even before in-store research was rendered impossible as a result of the pandemic, regulations – such as the General Data Protection Regulation – had already made it a complicated affair, so Mondelēz started asking community members to carry out shopper tasks. Now, the community has more or less absorbed that strand of work.

Given the adaptability of the approach, brands and businesses use communities for a range of insight and innovation needs. Felix Koch, regional chief executive, EMEA & APAC at C Space, says this covers everything from explorative insight work to product and communications development using co-creation methods, through to evaluation and optimisation of propositions and services.

"In the end, it's about helping our clients grow through the inspiration of their customers," Koch says. During Covid-19, C Space's clients have been relying on communities to make a range of decisions, including around trend forecasting: understanding what trends its customers are observing or participating in, and which they think will stay or go. Clients have also been asking questions around how they should go about reopening their businesses.

"They want to know how to communicate to both customers and employees during this crisis, and are looking for answers to how to meet the new, unmet customer needs," says Koch.

“What Covid-19 has done is make a lot of organisations ask themselves if they're really that well connected”



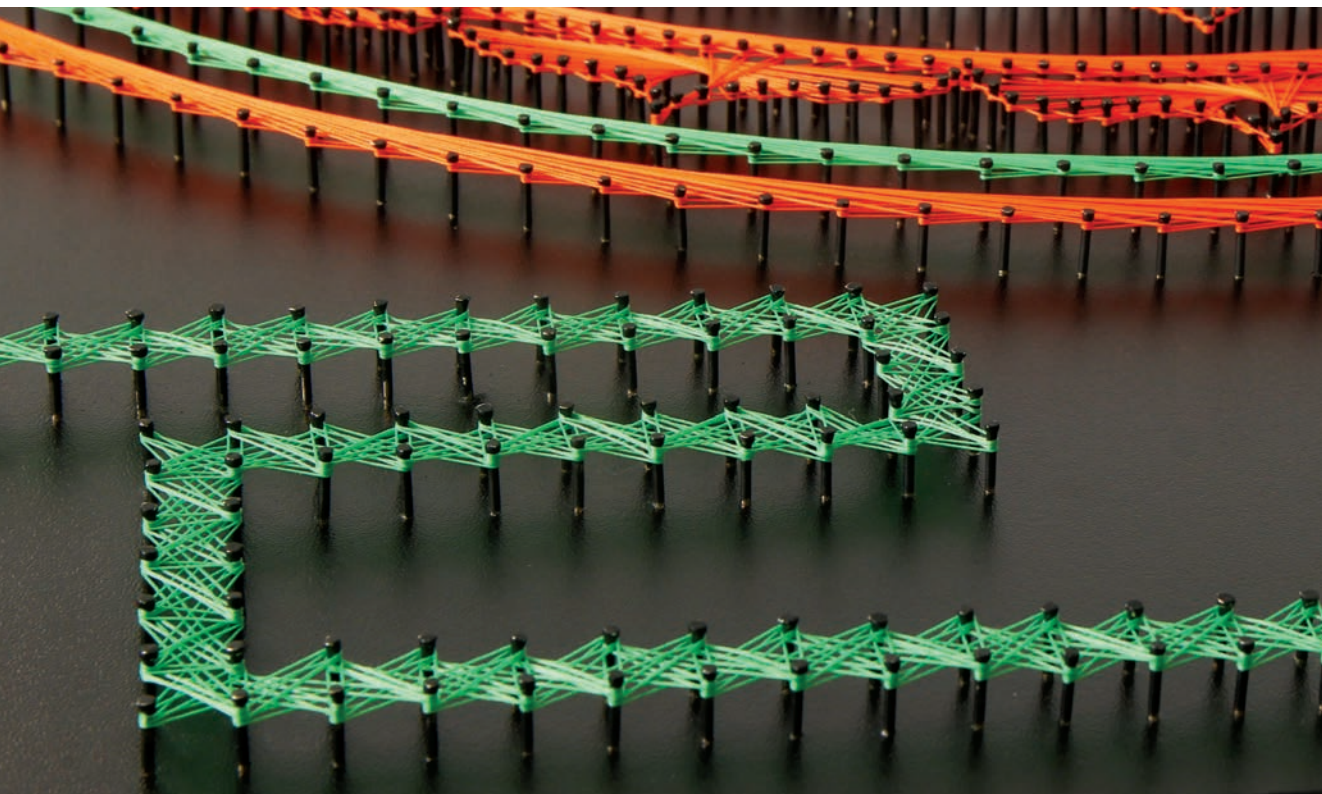
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It's not always necessary to prompt community members to offer up their thoughts. De-Morgan admits he's lucky to work in a space where people love to talk, and members do so among themselves outside of project requirements. These conversations have taken a shift in tone in recent months, however.

"People are very heavily invested in snacking," he says. "Historically, what we saw was quite general discussion about things such as holidays and activities – what people found themselves trying when they went away.

"But, in the past couple of months, we've seen a bit more emotion coming into it. Whereas before it was quite functional, now there almost seems to be a concern for other people within the community. People are checking in on other members and seeing how they're doing – asking not just about each other, but about each other's families.

"When there are new products, it provides an outlet of joy. All of a sudden, a new product from Cadbury is really exciting; it provides them with happiness and emotion that perhaps the external world isn't giving them."

InSites Consulting has run a number of Covid-19-specific communities, both on behalf of clients and for its own proprietary insight, and Lawrence agrees that

he's seen a higher level of interaction than normal. This makes sense: people were at home more, and therefore spending significantly longer online. According to UK Online Measurement (UKOM)-approved Comscore data, time spent online went from 3hrs 26mins per day in January to 4hrs 2mins per day in April. Julie Forey, director of insight at UKOM, says change of this magnitude is highly unusual. "Typically, when I look at the data, it doesn't change very much from month to month; it might be about five minutes' difference," she says. "Half an hour is a big leap."

There's been an increasingly personal feel to the exchanges in communities, says Lawrence. "People are thinking, 'I wouldn't mind talking to people that aren't just my family. Maybe they're going through some of the same things as me; how are they finding online shopping? How are they coping without the hospitality industry? What are they worried about in terms of healthcare, etc?'"

According to media psychologist Dr Pamela Rutledge, there can be a particular comfort in having these kinds of conversations. "When you're talking to a stranger, you don't have the emotional obligations that you do to your family," she says. "You don't have to worry about the interpersonal dynamics or



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Community case study: Airbnb

Founded in 2008, Airbnb has a community of four million hosts around the world, and its global community center was established five years ago, managed by Airbnb and community specialists Standing on Giants.

Alongside opportunities for gaining insight into the needs of its hosts, the community center aims to encourage more personal and meaningful connections, offering access to content and discussions that will help members to host better.

When the pandemic hit, the business was immediately under threat: guests were unable to travel, income disappeared and hosts' livelihoods were at risk. Airbnb decided to use this as an opportunity to adapt its business.

The objectives of the community shifted to support two key priorities:

- Create opportunities and a space for hosts to stay connected with Airbnb and each other. Prioritise helping them navigate new types of business, best practice, and tackling the loneliness and isolation associated with lockdown.

- Support hosts to safely execute 'frontline stays' – the company's initiative to accommodate 100,000 health workers who needed to isolate from their families.

Airbnb opened a dedicated space for hosts to focus on Covid-19 discussions, centralising related questions, and left other areas of the community free for other conversations. The company successfully housed 100,000 health workers safely within two weeks.

Robbie Hearn, co-founder of Standing on Giants, says: "In times of crisis, an online community really can be more than a collective of your customers; it can be a lifeline for your business.

"In Airbnb's case, it became even more than that. The company could work with its community of hosts to achieve something that neither they, nor the hosts, could have done on their own. The deep value of the community became clear for all to see."

managing those relationships. In that sense, it can be like going to confession if you're Catholic. It's a non-judgmental expression, and it can be cathartic to get things off your chest."

These more personal conversations are also taking place in communities in very different sectors. Dominika Wintersgill is research manager at National Employment Savings Trust (NEST), a workplace pension provider, and another of InSites Consulting's clients. NEST has three core audiences: employers, members (pension-holders), and intermediaries (financial advisers, pension administrators and accountants). Its research community consists of more than 2,000 members and has been running for almost a year.

While community members have always interacted with each other to some degree – starting threads to ask questions or offering tips around organising their finances – Wintersgill says it has, typically, been fairly limited. As a professional organisation that looks after people's money, it's important for moderators to maintain a certain professional tone in discussions. However, the organisation did some work with its community on Covid-19, and people have been very



candid. “Some are going through very difficult times at the moment, losing their jobs and so on, and they were happy to share with others,” she says. “In fact, they found it useful; quite a few people said it was nice to be able to talk about how they were feeling and what was going on with them, especially when they’re stuck at home.

“In this country, it’s not the done thing to discuss finance at the dinner table. I could tell just from reading the posts how important it was for them to have somewhere to share their thoughts.”

While part of the appeal for NEST of starting a community was speed and value for money – those benefits will always be a core appeal, it seems – it was also mostly a move to better engage stakeholders around the business.

“When someone says to you on a Monday, ‘I’m not sure about this’ or ‘I wonder what members are thinking’, and you can give them an answer on Friday, it’s fantastic. Stakeholders get used to it, and they keep coming back,” says Wintersgill.

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“Normal assumptions no longer apply... so I can’t just use my old heuristics to understand behaviour”
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Now NEST uses its community for almost everything, from testing communications to uncovering specific needs, beliefs and attitudes around pensions, retirement and money. It is also used to validate responses from its other research activity, including its voice-of-the-customer trackers and surveys prompted by member activity. As communities can sometimes be dominated by the

thoughts of a few forthcoming members, it’s important to corroborate findings in the other direction, too, says Wintersgill.

“You can have a few really loud voices in a community, so you need to check on the situation statistically,” she says. “We add these all together to get the full picture.”

This validation approach is especially important in circumstances such as those we’re currently facing, according to Dr Rutledge.

“This is a once-in-a-lifetime event, so normal assumptions no longer apply,” she says. “Where previously people knew what they liked to do, now they have to make decisions based on a new set of circumstances and new information. So, as a business, I can’t just use my old heuristics or assumptions to understand behaviour.

“This is why research in these communities is so important – you’re looking for the narrative behind the numbers so you can see if, and why, the stories are shifting.”

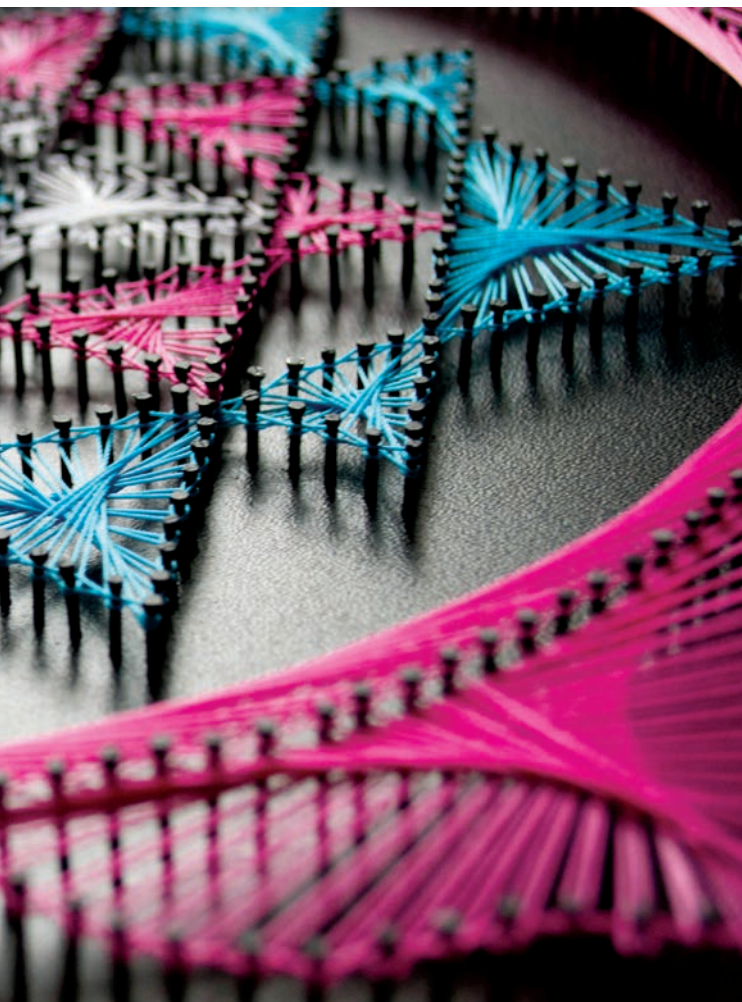
Tools of the trade

The core approaches used with communities include forum discussions, text live/web chats, video chats and focus groups. InSites Consulting’s platform, The Square, includes more than 100 tools, including many inspired by popular apps. Its swipe tool, used to screen concepts, was modelled on dating apps such as Tinder, while another tool aims to sharpen responses to open-ended questions by restricting them to 140 characters.

While these tools can improve short-term response rates, offering community members ways to share feedback that feel intuitive is vital for both accuracy and long-term community engagement.

“I’ve had a feeling since I was a young exec, going door knocking, that market researchers have always been good at getting people to participate on our terms, and not on their terms,” says Lawrence. “I think it would be so exciting for us to get a bit smarter around getting people to participate in ways that feel right for them.

“For example, in research, we talk about representative samples and these kinds of constructs,





but we should be thinking about other things, such as: are they a creative kind of person or a validating kind of person? Are people happy to interact via video or would they prefer to do a quick mobile survey?”

The fact that community members are able to interact, bouncing off each other and stimulating each other’s comments, takes the dynamic into a more adult-to-adult exchange, adds Lawrence.

“A lot of research in the past has had that parent-child psychology behind it: I ask you a question and, because you think I’m an important person, you give me an answer. But that’s a different dynamic from us just chewing the fat as adults. It gets you to a different understanding of consumers’ lives.”

This more discursive approach not only uncovers fresh insights, says Dr Rutledge, but also allows us to make meaning out of things in a different way, which carries psychological benefits.

“It’s why brainstorming with others is more effective than brainstorming by yourself – because, when you say things out loud, you hear them differently; it sparks a different set of ideas, and allows you to create new meaning and make sense out of things,” she says. “Generally speaking, it moves you forward in a positive direction, especially in times of stress. It’s a great opportunity, because people are feeling vulnerable and in need of expression.”

Executive immersions

A side-effect of social-distancing restrictions has been that more of us are now much more comfortable talking to strangers and loved ones over video chat (Comscore’s data also revealed that Zoom added 12.3m users between January and April – the highest growth in unique visitors across all online categories). This includes senior executives in client businesses, who not only have more time, but more desire to connect directly with customers.

According to Lawrence, while InSites Consulting UK (as Join the Dots) had run occasional programmes connecting senior executives to customers, there has been an increased desire for this kind of approach in recent months.

“The interesting thing that’s happened is that people are at home. I use the term ‘people’ deliberately, because senior executives have become more like people,” says Lawrence. “They’re not walking into their organisation and seeing the corporate sign above the door; they’re at home with their families. They have a better understanding of what everyone else is going through.”

When a senior executive talks over video chat with a customer, both are in their own home environment, and they are likely to be dressed casually, so the dynamic is again more of an adult-to-adult exchange.

Senior clients have also been more present in other types of community research. Lawrence explains that a recent digital workshop – which would ordinarily have happened offline – had an audience of senior executives stay for the duration. In other circumstances, he would have expected to lose this audience at different points, to a meeting or a phone call.

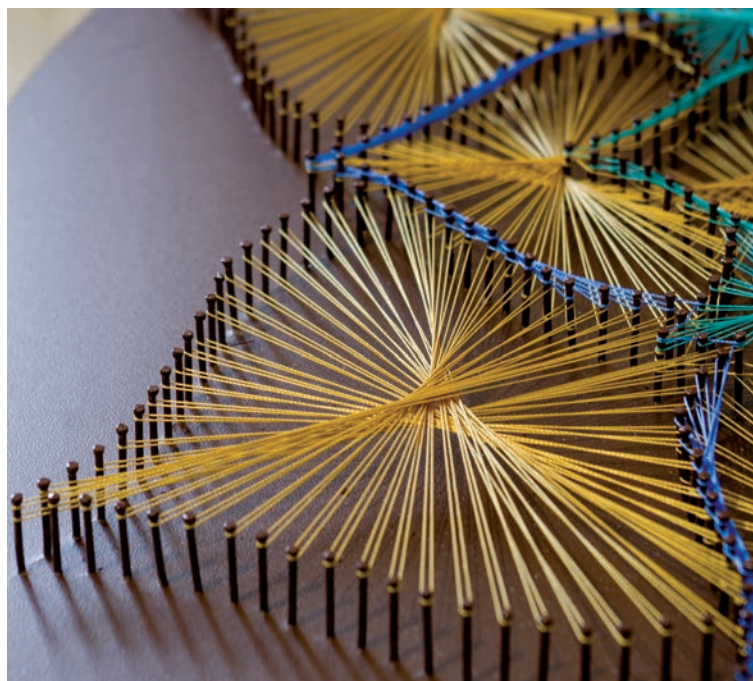
“They’re committing time to understanding customers – in part because they’re becoming a bit more consumer-obsessed, but also because the distractions are a bit different,” says Lawrence.

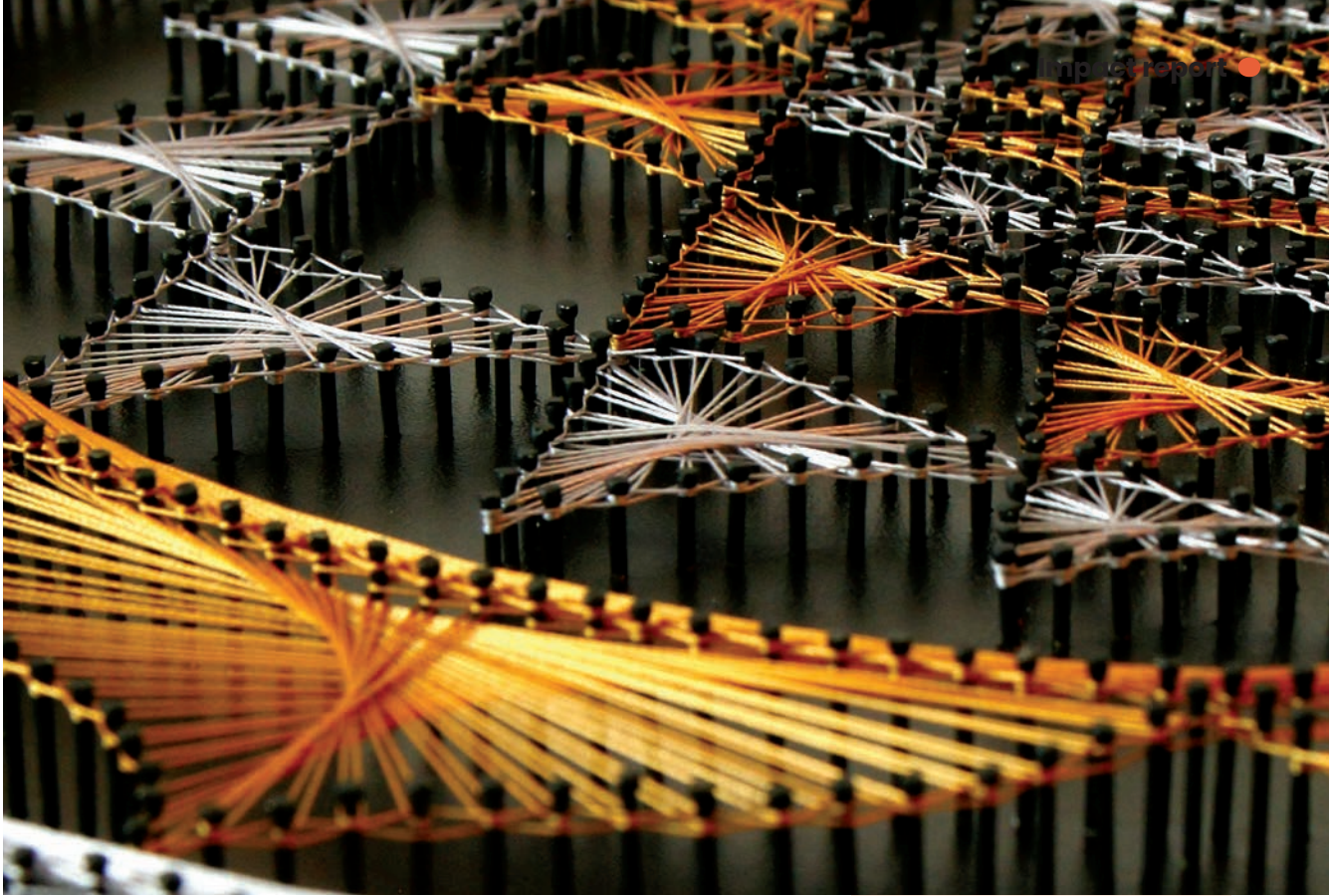
Ed Herten, who runs the customer closeness proposition at C Space, agrees that there has been a massive shift in attitude towards customer closeness among senior executives.

“The thing that I saw right at the beginning [of Covid-19], and I’ve been watching ever since, is that the demand for direct, immediate customer insight has been incredible,” he says.

Most of Herten’s clients are now presenting customer updates to their executive team once a week, which would have been highly unusual just a few months ago. “One thing we’ve been told by every single client is that the speed of decision-making has just gone through the roof,” he says.

“We slide back in a lot of things as a species, but we don’t tend to slide back much when it comes to speed. Once we have got something fast, we don’t like it slower.”





Community research your way, at your pace

While our doors have been closed for the past few months, our minds have had to remain fully open. Open to finding new ways to connect and collaborate with diverse audiences; open to observing changing consumer habits, needs and behaviours; open to re-evaluating what people want from a brand.

Since their inception 15 years ago, market research online communities (MROCs) have evolved to survive the ever-increasing pace of change in the world, and provide an open and ongoing dialogue between people and brands. Communities are versatile; they can be large or small, ongoing or pop-up, and run by agencies or clients. They allow you to conduct research your way, at your pace – any type, any topic, any time.

Flexibility in how to connect, and with whom, fosters the best type of collaboration. Brands must collaborate with mainstream audiences to understand unmet

needs, explore untapped behaviours, and evaluate ideas, concepts and experiences. However, if we apply the 90:9:1 principle that originated with Bradley Horowitz, vice-president at Google, these mainstream consumers (representing 90% of the population) are equipped only to validate and evaluate ideas. So, brands must also collaborate with creators (1%) and curators (9%) to achieve richer, more diverse insights. To facilitate this, we use eYeka – our global network of more than 425,000 creatives – to develop or activate original ideas. We also use our Illume Network of leading-edge consumers to uncover emerging trends and optimise solutions in a particular category or market. The power of collaboration, therefore, is in the mix.

In today's unpredictable business environment, brands must harness different voices, and enter a mode of agile and fast decision-making to

survive and even thrive. To do this successfully with an online community, I'd recommend brands:

- Choose a community platform that suits your service needs, be that self-service, full-service or somewhere in between
- Think about residents (your core target) and visitors (sub-targets) to establish the size of your community
- Define the duration of your community, based on objectives – pop-up for agile co-creation and innovation v structural for ongoing connection and collaboration
- Invite the right people to take part in research by acknowledging the 90:9:1 principle.

Whether exploring branding, innovation or customer experience, online communities foster collaboration and trust, so that people and brands can shape the future better, together.

Andy Cumming, managing director UK, InSites Consulting

Taking stock of insight

Tesco has access to a wealth of data on its customers and employees, but simplicity and clarity of purpose are paying dividends for the insight team in 2020.

By Katie McQuater



As group insight director at the UK's biggest supermarket chain, it's perhaps unsurprising that one of Naomi Kasolowsky's priorities is to keep things simple, both in terms of purpose and output.

"Insight teams have a huge responsibility to convey meaning with as much accuracy as possible – especially when you work in a business like Tesco, where you work with a lot of stakeholders and the impact of what you're saying or recommending is far-reaching," she says.

Never has simplicity and clarity been more necessary than during the

complexity of the past few months. For a company at the forefront of responding to the pandemic, from keeping stock levels stable to introducing a range of new social distancing measures, insight has been in high demand.

Kasolowsky is responsible for all the insight teams across Tesco, including more than 100 people in the UK and teams overseas. The responsibility of the function is to identify opportunities for growth and inform how the business develops new propositions, as well as being accountable for customer understanding and the impact of propositions on brand health and customer experience.

The team uses a partnership model to work with colleagues across the business, including the customer function, strategy and finance, product function, category buying teams, and product development.

The team has recently invested in thinking differently about how it partners with these stakeholders, forming a closer relationship and embedding themselves within the processes and functions they support.

"We walk more in their shoes and we take ourselves out of the vantage point



of being in the insight team,” says Kasolowsky.

“That’s a new way of doing things and it is enabling folks in the team to feel they’ve had the right opportunity to develop consultative skills. You need sales skills to be able to have impact and influence, so we want to focus on that.”

Understanding colleagues

As well as understanding customers, the insight team is responsible for carrying out research with Tesco’s large employee base. The retailer recently launched continuous colleague listening for the first time – providing the team with a continual flow of data from employees.

“It gives us a stream of really trustworthy data and insight about how colleagues are feeling, and how that relates to how the business is doing – whether that’s the corporate brand or the employer brand,” says Kasolowsky.

As well as obtaining data on whether its colleague propositions are driving advocacy, and the key metrics around its workplace programme, bringing that data together to analyse it alongside the

“We needed to understand how confident our colleagues and customers were feeling”

company’s customer insight will be a key focus for the team going forward, says Kasolowsky. “It’s going to bring us a whole new level of understanding we have not had before.”

The pandemic offers a clear case study for the ways in which Tesco’s staff and customers intersect. Like all supermarkets, Tesco introduced multiple new measures in-store as a result of Covid-19, including protective screens, one-way systems, and reserved times for vulnerable shoppers. These changes, of course, did not only impact customers, but also the firm’s employees, who had their own thoughts and anxieties.

Kasolowsky explains: “We needed to understand how confident our colleagues and customers were feeling, how fearful they were, and the extent to which Tesco’s response was allaying those fears and building confidence, so we asked the exact same questions of

colleagues and customers.”

Looking at customer research alongside employee insight gave the team a “robust understanding” of what to focus on, according to

Kasolowsky, particularly in the early days of the pandemic, when Tesco needed to decide on the most important measures to take to support employees and customers in store.

“We’ve got a lot of colleagues and a lot of shops up and down the country, and they can be a very good barometer for the mood of the nation but, equally, we knew that in those early days, we had to make some choices about the most important things we needed to do.

“Because we looked at the two things together, I think we came up with quite a sensitive, human response. This was an example of a time when you needed smaller data to be able to really know that’s the right thing to do. Let’s say you roll out the wrong thing to 2,000 shops – that’s quite a big deal, so we had to get it right.”

The insight team also analysed shopping behaviour to understand differences in shopping patterns across



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“We had a very strong purpose – we anchored ourselves on our job and it was very clear what we were there to do”
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different types of store – for example, looking at whether there were different issues faced by Tesco Express than Tesco Metro – to help the company’s leadership team make decisions on issues such as closing times.

Early on, Tesco formed a cross-functional team that was focused singularly on understanding what was happening with Covid-19, formed of a mixture of analysts and research skills to assess the situation from various perspectives.

“We almost became like a news desk,” says Kasolowsky. “We moved to daily insights sharing because we were making decisions every hour about what needed to happen.”

Are there any ways of working implemented during this period that Kasolowsky would like to take forward? Simplicity – both in terms of the team’s purpose and in terms of output – and communication are high on the list, she says.

“We had a very strong purpose – we anchored ourselves on our job and it was very clear what we were there to

do. Going forward, that clarity and simplicity of the role of the team and keeping things simple was incredibly helpful.

“Because people didn’t have time to read everything – there was an unbelievable amount of communication – it meant we had to sharpen the communication of our deliverables, key insights and recommendations, and make them digestible for stakeholders. I think we’ll hold on to that.

“The communication between us was also very strong. My teams are in a lot of different countries and locations, but when you are all virtual, it makes everything very equal.”

Panel perceptions

During the first few months of the pandemic, the insight team needed to press pause on the own-brand product testing conducted within its continuous panel, and so it took the opportunity to

review the panel, as well as assessing its membership from the perspective of diversity and inclusion.

As product testing was not possible, the team then used the panel differently, to

conduct research on people’s perceptions of what was important to them during the first months of the pandemic.

While Tesco has a wide roster of agencies, this panel is managed in-house by the team, meaning they have quite a close relationship. “We continued all of that because we want them to have a voice”, says Kasolowsky. For example, the panel provided insight on what role value, price and promotions played in the mindset of customers during lockdown.

Data – both big and small – is, of course, central to the work of the insight function. Kasolowsky’s team analyses data from the Clubcard scheme, for example, and works closely with data science and enterprise analytics teams within the business. Inclusion and representation is also a priority, she says. “We are trying to really get on top of the techniques and ways in which we

understand the people of this country in a much better way than maybe we ever have done before, because it's the right thing to do, and as a brand like Tesco, that serves everyone, it is incumbent upon us to do that."

For Kasolowsky, with multiple data sources available within organisations, insight teams should think carefully about how they are viewed internally, their positioning within the business, and where they can uniquely add value.

"You need to be able to partner effectively and form those bonds across the organisation, otherwise you're kind of in a vacuum. You can come up with brilliant things but they're never going to go anywhere, because they're not going to solve someone's specific problem, because you probably don't know what the problem or question is.

"That's what I always instil in the team – 'the answers are not found at your desk. You have to engage with the business and understand how it works, and then use the things that are uniquely yours to do to help get a better answer than if stakeholders try to do it themselves.' That's fundamentally what we need to be doing – day in, day out."



Zoom cooking

This Easter, with the country under stay-at-home restrictions, Tesco had to adapt its long-standing 'Food Love Stories' campaign.

First launched in 2017, the campaign features ads focusing on cooking different meals throughout the year, with accompanying recipe cards available in stores.

Many of the 'stories' focus on families congregating at mealtimes. However, with many people unable to celebrate events like Easter in person this year, Tesco tweaked the campaign.

Research from Tesco conducted during the lockdown period found that one in five people reported cooking from scratch more frequently, while video calls with family were considered one of the highlights.

The insights led to the development of two new 'stories', one of which showed members of a family learning how to make a meal via video call with relatives.

As more people were watching TV at home, and Google and YouTube saw an uptick in usage on a range of channels including baking and indoor exercise, Tesco's media mix for the campaign focused on these channels.

Kasolowsky says: "Our business had to adapt and respond to Covid-19 in many ways, and it was essential that we were quickly able to grasp how our customers were feeling and how we could remain relevant to them.

"Our 'Food Love Stories' campaign is focused on bringing people together through food. With everyone in lockdown, our insights highlighted that this was even more relevant to our customers – the idea of bringing people together, even if it had to be virtually. As we approached Easter, we also knew that many more of our customers were cooking from scratch, and the team was able to bring this to life with Zoom-based Nan's 'long-distance' roast lamb and John's 'isolation' aromatic lamb."



At the heart of the matter

TI Media publishes some of the UK's best-read magazines, and insights are helping to shape its titles' tone of voice, as well as keep them in touch with their core audiences. By Liam Kay

Perhaps you are reading for lifestyle tips. Maybe it is to see what television to watch this week. It could be to catch up on the latest celebrity gossip and real-life stories. You might be a sports fanatic, or a keen cyclist. Whatever the reason, there is a good chance you have encountered one of TI Media's magazines.

The company, formerly Time Inc UK, publishes more than 40 media brands across print and online, including *Marie Claire UK*, *Horse & Hound* and *Woman's Own*. It has also now become part of fellow publishing firm Future, through an acquisition completed earlier this year. With each title comes a dedicated audience and fertile ground for market research.

Richard Thomas is TI Media's insight director, setting the strategic direction of the company's research function. His role is, essentially, to integrate

insight into all parts of the business, but predominantly to support the company's commercial objectives and income.

Insight sits within a wider customer strategy team at TI Media, and the team has access to a broad array of data, such as subscriptions to third-party datasets, and also commissions its own research projects.

Thomas's team consists of three others, the insight division – like many across industries – having shrunk in recent times, from a headcount of 11 when he first joined four years ago. Having fewer staff has resulted in some projects deemed non-essential being dropped in favour of those that more closely match the company's objectives, he says.

"You really do have to be laser-focused," Thomas explains. "We have an expertise that we truly think is valuable, and we can justify our existence, but we

have to work with the business to make sure we are working on the right things and delivering a return.”

Heart of Britain

Last year, the team worked with insight consultancy Differentology on an analysis of one of TI Media’s core audiences – women aged 35 and over in social grades C2, D and E – for a project called ‘Heart of Britain’. Thomas says he wanted to get under the skin of one of the UK’s biggest demographics – one that drives a lot of revenue for the company – but also one that, he argues, has been neglected.

“We felt we needed to re-establish our authority and our own credentials, and have something fresh to say about them – but we also genuinely felt they were misunderstood and, quite often, ignored by the media planning and buying community,” Thomas says. “We felt advertisers were doing them a disservice to some degree, by either ignoring them or not tweaking or adjusting the way they spoke to them, as they were seen as less sophisticated.”

Part of Differentology’s work on the project consisted of 12 ethnographies with participants from across the UK (outside London). The ethnographies involved conversations in more relaxed settings, such as walks with participants, rather than more formal sit-down interviews.



“We have an expertise that we truly think is valuable, but we have to work with the business to make sure we are working on the right things and delivering a return”

Lizzie Gilthorpe, managing director at Differentology, says that the research aimed to get more of a sense of the importance of the audience within their communities, and the context in which they live. “One of the key things was that the audience are often seen as the ‘anchor’ within their neighbourhoods – so, rather than just doing in-depth interviews, we went for walks with them in their neighbourhoods.”

Differentology used artificial intelligence to analyse transcripts from the ethnography and discourse analysis to identify people’s emotions about different subjects. This was followed by quantitative work to make comparisons with the rest of the population.

The results identified four “key pillars of behaviour” across the sample, explains Thomas. The first was their strength in their role as care givers, and the second was economic power – described by Thomas as “the biggest in the country”.

Another theme highlighted by the research was the “savviness” of this particular audience – agile budgeters, they have a lot of control over household finances and spending decisions, from weekly shops to buying a car. Finally, the study pinpointed women’s role as influencers at the centre of families, friendship groups and wider communities.

“If you can influence this audience, they speak and influence others, and people go to them for advice on both a personal and commercial level,” says Thomas.

The findings have been used to influence editorial tone of voice across various TI Media magazines, specifically the ‘real life’ magazines often read by this audience. This includes *Woman’s Weekly*, *Woman’s Own*, *TV Times*, *Pick Me Up*, *Woman*, *TV & Satellite Week*, *Chat*,

What’s on TV, and *Good to Know*.

“This was an audience that felt spoken down to by brands, generally,” Gilthorpe says. “So how could TI Media speak to them on their own level, rather than it seeming like a patronising tone of voice?”

The research has been repeated this year, with a few tweaks in light of the pandemic. One of the big changes is to include more video-research content, featuring edited interviews with the women in the study, which Thomas says lets them “tell their story more and be the star of the show”. The study will focus on the ‘savviness’ pillar identified in the first study, with budgeting a central element given the economic impact of Covid-19.

Collaborating

‘Heart of Britain’ is TI Media’s flagship study, but there is plenty of other insight work going on across a wide range of teams and publications, from the executive team to the advertising department to editorial.





“I try to put us where decisions are made, because that’s where I think genuine insight can benefit the business,” Thomas says. For example, the research has been used to help shape the company’s advertising strategy over 2019 and into the early part of 2020.

“Once a [magazine] brand sees how you can help them, and what you can do for them, they quickly become advocates of an insight-first approach – and you have a direct relationship, and conversations where they will come to people in my team as a first port of call,” Thomas says. “Editorial content and advertising are two obvious areas where we can help colleagues. Where

you build a brand affinity and prove your worth, that’s a direct line for sharing information, and requests come back and forth.”

To assist with working across so many teams and titles, the company runs an internal research platform called the Lens, which allows it to quickly survey particular audiences. The Lens is used for smaller, topical pieces of research that are often aligned to specific challenges faced by the business, strategy projects that require consumer insight, and projects focused on advertising revenue. Information from the research is available to anyone in the business through a data platform. TI Media also conducts around 30 effectiveness studies a year to evaluate its titles.

Earlier this year, the Lens was used to run a weekly tracker on what the public were thinking and feeling during the pandemic. The research, which covered a 17-week period from the beginning of restrictions in March until the situation eased in the summer, was originally commissioned to help inform editorial content. However, results have also been used commercially by agencies and clients, at a time, Thomas says, when advertising spend was generally being withdrawn and media plans were being ripped up across the industry.

The insight team used findings from the tracker to develop a commercially led insight bulletin, *Virus Britain*, to create a narrative from the weekly data emerging from the tracker.

The publishing industry was badly hit by Covid-19, after a tricky few years for the sector, with falling readerships and advertising revenue. TI Media still gets a large amount of income from its weekly titles, many of which cater to the ‘Heart of Britain’ readership, and Thomas says the company remains print-focused from a revenue perspective. As with most other publishers, however, the print audience is falling, with new digital readers needed to ensure long-term success.

Making sure the company attracts digital readers without alienating its core print readership is the big





“Once a brand sees what you can do for them, they become advocates of an insight-first approach”

challenge that lies ahead. “There is a tricky balancing act in supporting print revenue in, for example, our weekly titles. Our women’s, TV and ‘real life’ magazines have always been responsible for the majority of profit within TI Media, and a lot of that is in print and in the ‘Heart of Britain’ audience,” says Thomas.

“It is a good example of where an insight-led project has supported a lot of revenue.

“That’s where insight can play a vital role – it can support the here and now, but also take a step back and look at what we need to do, strategically, as a business.”

Tracking Christmas

TI Media conducted a research project to understand consumer sentiment about Christmas during a year dominated by the pandemic.

“This year, with so much uncertainty – and with ad revenue and planning being pulled or put on hold indefinitely – there was a feeling that Christmas is a fixed point when, whatever the state of the nation, people will spend and want to have a Christmas of some sort,” Thomas says.

In June, the company surveyed 1,019 participants, a fifth of whom were from the ‘Heart of Britain’ sample and an eighth from social grades A and B, while a quarter were millennials, aged between 25 and 40. The research found that 54% of respondents felt Christmas was the main thing they were looking forward to for the rest of the year, with 55% (rising to 63% of millennials) determined to make it bigger and better than ever.

Many of those surveyed reported that budgets would be tighter this Christmas, but a similar proportion claimed they would spend more than usual. A similar phenomenon was seen in the approach to advertising, with half wanting more sombre adverts this year, while 41% wanted to see all-out celebration.

Thomas explains that the findings will be used to support the company’s approach to Christmas 2020.

Some titles, for example *Woman & Home* and *Goodtoknow.co.uk*, will use the findings to direct their editorial content in the run-up to the festive period – such as whether to run articles promoting budget alternatives or target a more affluent demographic.

The project will continue in the weeks and months before Christmas, to support titles as they look to understand the perceptions of their readers and how they can meet their needs.

Friend or foe?

Cooperating with competitors can have benefits for businesses, but working with rivals can also have a harmful effect on performance. By Katie McQuater

Collaboration has become an increasingly prevalent watchword in business, with companies more attuned to the value of working with others.

But what happens when organisations work with, rather than against, their competitors? Whether for collective good or individual benefit, cooperation strategies can strengthen business – to a point.

Cooperating with others, either in times of crisis or calm, can allow organisations to tap into collective strength and harness joint resources.

James Crick, assistant professor in marketing at Loughborough University, has been studying the issue of cooperation with competitors – or ‘coopetition’ – for a few years. He says there is a clear opportunity in a joined-up approach, particularly for smaller, under-resourced organisations, helping them to access equipment, information or knowledge that they wouldn’t otherwise have.

“Although it may not lead to firms having a competitive advantage, it may be the difference between surviving and failing within the market,” Crick says. “If firms are working hard to cope with all the shocks that everyone else is facing in the commercial world, it might mean the difference between being in business or having liquidity problems.”

During times of crisis, the importance of collaboration becomes ever more apparent, and even necessary.

As Covid-19 took hold, Boeing and Airbus partnered to study how the virus behaves in aeroplanes; UK competition laws were temporarily relaxed to allow supermarkets to share data with each other to help keep stock levels up; and

pharmaceutical companies began working together to develop a vaccine.


Crick’s most recent paper, published in *Industrial Marketing Management*, focuses on the advantages and disadvantages of coopetition during the pandemic. One of the paper’s recommendations for practitioners is that, during a worldwide emergency, organisations should consider the potential mutual benefits of coopetition strategies – to meet unprecedented demand, improve performance and the efficiency of supply chains, or simply to survive within a volatile market.

Businesses must be aware of the extent to which they are legally permitted to engage in such strategies, however, as government rules do not permit forming monopolies. While coopetition may be allowed to help firms cope in times of crisis, they can be penalised for collusive competitive practices. There is also a fine balance to be struck between a mutually beneficial relationship and an arrangement that could end up harming a business.

Collaborating with competitors has its disadvantages and can be a hindrance if businesses don’t proceed with caution. Tension between organisations if strategies are not managed correctly, power imbalances, trust issues, and opportunistic behaviours can all negatively affect the success of cooperative arrangements, says Crick.

“Firms losing intellectual property can also be a drawback, or simply sharing an excessive amount of information, losing their USP, and diluting their competitive advantages,” he adds.

Evaluating the success of coopetition strategies will vary depending on the businesses’ objectives,



which is a challenge in itself if these are not aligned. While some may cooperate to learn how to treat their customers better – measuring that by customer satisfaction scores – others might want to focus on financial or market metrics, such as profitability and market share.

A rising tide

Of course, there are other, more subjective, metrics for success – such as quality and reputation. For example, Crick cites the wine industry, in which some businesses want to collaborate for the greater good of their region.

“In a group of established wine producers in a particular region, they’ve worked for decades to establish that wine region. Imagine a competitor comes to that region, or buys an existing vineyard, and doesn’t know what they’re doing. They could ruin the reputation that everyone has worked tirelessly to develop – so they cooperate with their competitors to make sure people are producing at the right level and to reduce the chances of it going wrong.”

In service-based industries, where companies often compete for a finite amount of customers or resources – for instance, client budget – businesses can only cooperate to a point, short of entering into more formal arrangements, such as strategic partnerships.

“No matter the extent to which firms are happy to work with one another, there will always be a point where that competitive instinct kicks back in and rivalry resumes,” says Crick.

So, beyond the crisis, is this a sustainable way of working in the longer term? According to Crick, the challenge lies in companies’ ability to engage in cooperation to an “optimal level”, which is difficult to do.

“It’s about choosing what you might refer to as ‘complementary competitors’ and trying to determine whether they are actually going to be helpful or a hindrance. If you’re collaborating with competitors aimed at a different set of customers, it’s ‘apples and oranges’ and it can be a hindrance to survival.

“But it’s also being able to acknowledge when things are going wrong, and when to say: ‘Is it time to go our separate ways and resume operating individually?’”

● **‘Coopetition and Covid-19: collaborative business-to-business marketing strategies in a pandemic crisis’, James M. Crick, Dave Crick, *Industrial Marketing Management*, Volume 88, July 2020**



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little; together, we can
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The lucky, the unlucky and the abundantly blessed



First, the lucky: with Covid-19 decimating real recreational businesses while boosting virtual online activity, it's hard not to admire the lucky timing of vendors in the hotel and hospitality industry during last year's M&A frenzy. In the now struggling pub sector, the winner's curse befell Li Ka-shing, Hong Kong's richest man, who acquired Greene King for an eye-watering £4.6bn, including debt, while TDR Capital's private equity-owned Stonegate Pub Company took over Ei Group for a hefty £1.3bn. Both great leisure businesses, but very hard – or near impossible – to make a return in these surreal, socially distanced times.

Similarly, in the events and conferences business, the canny Neville Buch, who built and sold Blenheim Exhibitions to United News & Media in the 1990s, sold Tarsus, his second successful exhibitions venture, to Charterhouse private equity in 2019.

Lucky timing, or perfect timing?

I suspect it was the 11th year of the longest bull market and record levels of global debt that made this seasoned entrepreneur think things were as good as they could get. How right he was.

Meanwhile, Elegant Hotels, the owner and operator of seven freehold hotels and resorts in Barbados, had the good fortune of a bid late last year from the world's largest hotel operator, Marriott International, while The Ritz in Piccadilly, owned by the Barclay brothers and family, was acquired by Qatari interests from the rich Gulf state earlier this year. The lucky shareholders and owners of these operations sold at the very top of the cycle. What price are these assets today? What level of operating losses? What bank debts and covenants?

Second, the unlucky: sometimes, in retrospect, luck can be turned on its head and become sheer bad luck for simply thinking short term. For example, John Lewis owned 29% of Ocado at inception and sold down half its holding at the initial public offering (IPO) in 2010, and the balance in 2011 for £220m. Now that stake would be worth nearly £6bn, enough to invest in revitalising the core retail business, bolstering the pension fund, paying down bank debt, and holding a strong cash-rich balance

sheet in these uncertain times. One city analyst wrote at the time of the IPO that Ocado was worth zero: "Ocado starts with an 0, ends with an 0 and is worth 0." How times change.

But maybe 'unlucky' lack of long-term thinking is prevalent everywhere in business, where the hunger for quick returns overcomes the patience needed to build a world-beating enterprise? Leading media companies such as Reed International, Pearson and Granada once owned sizeable stakes in BSkyB (British Sky Broadcasting), which they sold long before Sky's £30bn takeover by Comcast in 2018. Rupert Murdoch painstakingly built Sky over nearly 30 years from its shaky inception in 1990 to its triumphant disposal. Indeed, Granada's holding in Sky alone would be worth more than the whole of ITV today. Similarly, estate agents Countrywide and Connells (alongside the Halifax and Royal & Sun Alliance) were

founding shareholders in Rightmove, the property portal, which they initially sold down in IPO in 2006 and, finally, fully over further sale downs. Today, Rightmove is a FTSE 100 company capitalised at more than £5bn and worth multiples of the near £50m valuation of Countrywide itself. Like the best wines, maturation and ageing make

the best companies richer.

Finally, the abundantly blessed: in contrast to 'unlucky' short-term vision, some companies have persisted long term and spawned global leaders – such as Racal Electronics and Acorn Computers. Racal was founded in 1950, listed on the London Stock Exchange and was once a constituent of the FTSE 100 index before being purchased by Thomson-CSF of France in 2000 – but it is best known today for being the parent company of Vodafone, the leading multinational telecoms group. Similarly, Acorn Computers was established in 1978 and broken up into several independent operations in 1998, but its legacy lives on in Arm, whose technology is predominant in the mobile phone and personal digital assistant microprocessor market. Blessed are the long-term visionary planners, for their offshoots will inherit the earth.

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“Sometimes, in retrospect, luck can be turned on its head and become sheer bad luck for simply thinking short term”
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Homing in

Homelessness has proved difficult for governments and councils to resolve for decades. Can data help find a solution? The Centre for Homelessness Impact is trying to find out. By Liam Kay

One in every 200 people in the UK is homeless. This stark figure, in housing charity Shelter's 2019 analysis of government figures, shows the scale of the problem facing the government, local authorities and charities. The issue is not just a social and humanitarian one – it is also financial. The 2015 report *At what cost*, by homelessness charity Crisis, estimated that 30 people sleeping rough could cost £600,000 a year, depending on the services needed.

Data analytics can help councils decide how to use their sometimes scant resources wisely when tackling homelessness. The Centre for Homelessness Impact, a charity that uses evidence tools to help address homelessness, worked with the Office for National Statistics to develop a platform called Share, with the aim of informing how preventing and ending homelessness should be framed and assessed.

The charity also runs a Housing Cost Calculator, which uses councils' data to estimate how much it would cost to implement different housing policies for homeless people. Councils need to have data showing the number of homeless people in their area, the types of accommodation they are in, and those people's characteristics, such as the support they require and whether they have recourse to public funds.

Part of its objective was to help reduce costs by taking all relevant data into account, providing a 'high level' overview of the solutions available to local authorities to house homeless people – such as whether to move them to temporary or permanent housing – and using it to address the challenges specific to the local area.

The calculator emerged from rethinking the centre's priorities and understanding the challenges councils face in tackling homelessness, according to Guillermo Rodríguez-Guzmán, head of evidence and data at the Centre for Homelessness Impact. The first councils the centre worked with were Southwark, Sutton and East Ayrshire. Using publicly available ONS data, the reporting platform shares more than 30 homelessness indicators, covering a range of subjects from local authority homelessness applications to house building and public attitudes.

In cases where there was a lack of information, the centre used assumptions based on the estimates of council employees. These were especially needed in the escalating and rapidly developing Covid-19 crisis, when thousands of homeless people needed to be housed quickly, often in hotels, to help stop the spread of the virus. A side-effect of the use of council estimates has been to underline their employees' expertise, says Rodríguez-Guzmán. When compared with more recent ONS data published later, the team was pleasantly surprised at their accuracy.

"The local authorities are in contact with the realities of homelessness, so connecting with them could be a lot more insightful than just waiting for data on the subject to be released three months later," says Rodríguez-Guzmán. "You need to trust people on the ground. No-one was capturing information, so we turned to those we expected to know better – and it turns out they did."

Once the tool has the basic data it needs from local authorities on the homelessness issue in their area, it creates scenarios and estimates the cost of moving people between different types of accommodation. It does this by combining action areas, goals and indicators, and is based on data and estimates supplied by local authorities. For example, for someone moving into social housing, it would estimate furniture costs as part of the scenario. The aim is to underline the long-term savings that could be made by moving someone off the street permanently, and reduce the burdens on multiple services by improving homeless people's lives.

"One of the points we wanted to make was that, if you move everyone to settled housing, you are not only ensuring they have a house for a longer period, but it is also cheaper for the local authority," says Rodríguez-Guzmán. "That was a really important element in how the tool was designed."

Developing the calculator was not without challenges. The UK benefits system is highly complex, which meant that under-35s had to be excluded, while other people were subject to benefits caps, depending on their personal circumstances. Data quality was patchy across council areas, and there was a lack of harmonisation between the four nations of the UK.

The tool has helped in practice. Bloomberg Associates, the consulting arm of charity Bloomberg Philanthropies, works with cities to improve the quality of life for residents. It worked with the Greater London Authority, using the centre's tool to look at how to move homeless people into permanent accommodation in the city, the likely cost of doing so, and whether costs could be offset. In some cases, using the tool reduced the costs by 80%.

Stop, collaborate and listen



Stop, collaborate and listen. Vanilla Ice song lyrics are – admittedly – a strange source for inspiring leadership qualities, but the notion of collaboration and listening to ideas is so important to what we do in analytics. For our industry, I believe collaborating and listening are the essential elements in how we work, ensuring we get the best out of what we do. Collaboration allows us to unlock the opportunity to connect our data assets and, most importantly, provide combined thinking that will lead to great analytic results.

After my last article, I had a few readers contact me to discuss how finding ways to work together has never been more important given the economic circumstances in which we find ourselves. That feedback, and the current economic backdrop, got me thinking about what we need to have in place to drive the best of our analytic community through collaboration.

Everyone sees collaboration differently, but, for me, it is about some basic principles: bringing together diverse thinking and a willingness to be open, and to see the bigger potential of what connecting can bring. If we can deliver on these – and continue to do so as our respective industries face the issue of Covid-19 – we can still produce great analytic outcomes.

Diversity in where we draw our thinking from is essential if we are to maximise our creativity and impact. Contacting emerging organisations, listening to innovative ideas and finding new talent coming through academia will ensure a freshness to our ways of working, and ensure we are challenging the status quo. This is vital if we are to improve on the strong analytic foundations that are in place. We must create a positive energy around the great work we do in analytics and shout about new approaches that will ensure we draw in a diverse

slate of fresh-thinking analysts and companies in the future.

We need to maintain a network of open-minded people who are willing to share ideas and look to develop them. There are great champions of this. I always look to attend the MRS analytics conference because it is an example of how organisations are willing to share their thinking for others to follow. It demonstrates a confidence that what is being shared is just one part of the story for those organisations, and that they are already on to the next big question and opportunity. We can all aspire to that.

The ability to see something different and bigger is vital for our sector. At times, we all need to face a business question with a new approach or creative thinking that requires us to go

beyond our own data assets. Data-led analytics can deliver the right answers to these questions when we are open to connecting data and harnessing new approaches. I have observed this freedom of thinking in hackathons during my time working in media analytics – analysts looking to find the answer to an immediate question and then building on that to

get to the next challenge. This positive, broad-thinking mindset represents the best in collaboration and can deliver great results.

There will always be commercial barriers to collaboration, but if we can avoid siloed thinking and create an environment that brings this thinking together, we can ensure the analytics sector is set up for great success.

Like many others, I am missing the ability to meet face to face and connect over a coffee, but the past few months have shown that we can keep the connectivity flowing and that our work networks can still flourish. I have continued to meet new and emerging companies, and am now developing work with some of them. That is how we will show the power of collaboration and maintain the voice of analytics in these testing times.

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“We all need to face a business question with a new approach or creative thinking that requires us to go beyond our own data assets”
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Making sense

As director of Sense about Science, Tracey Brown is focused on improving the understanding of evidence and finding the right questions to ask. By Liam Kay

From genetically modified foods and the MMR vaccine to more recent conspiracy theories about Covid-19 and 5G masts, it can be difficult to communicate legitimate scientific evidence to the public.

In a world where misinformation and misinterpretation of evidence can easily proliferate, how do you help the public scrutinise and interpret the outcomes of scientific study accurately?

Sense about Science aims to make science – and evidence more generally – more accessible to the public, politicians and journalists, and correct some of the misconceptions that arise. Since its creation in 2001, the organisation has spearheaded several successful strategies to improve understanding of evidence, from ‘evidence week’, which has run in the UK parliament since 2018, to the AllTrials campaign to publish the results of all clinical trials.

“Over the past two decades, we have become more focused on system change, and thinking about the capacity within particular systems – whether that is parliament, the media or community organisations – to engage critically with evidence, and looking at how well-equipped they are with the right questions and insights they need,” says Tracey Brown, director of Sense about Science.

“What has stayed with us from those early days is that we always started with the real questions people had, rather than the story researchers want to tell. Whereas researchers might think about how they want to put their work across to society, we have always started with questions such as ‘should I be worried about the phone mast at the end of my garden?’, and unpacking that. Our term for it is ‘public led, expert fed.’”

Sense about Science works with organisations, including the government, parliamentarians, the media and researchers, to help them ask the right questions or present findings in ways that ease interpretation.

For example, ‘evidence week’ emerged from a desire to help MPs analyse the impact of technical

legislation, while recognising the range of other issues they have to deal with on a daily basis, Brown explains. “MPs can be dealing with 40 problems a day in parliament and constituencies, and you need to turn from discussions about innovation to, perhaps, one on drone noise – it’s the same with journalists,” she says. “How does the insight community equip them better with the research, knowledge and resources they need to ask the right questions and scrutinise the evidence?”


The pandemic has heightened the importance of communicating accurate information, with the relative lack of knowledge about the virus meaning conspiracy theories have circulated, and speculation about the disease has been reported in the media and discussed online. However, Brown feels it has also opened up opportunities to educate people on research and evidence, offering a real-time demonstration of how the research-gathering process works.

“For those of us looking to equip people with a better understanding of evidence and the right questions to ask, that has opened up enormously. I am very glad it has opened up around modelling and data science, as this is a field that has had little public, policy and media scrutiny, and yet is advancing rapidly in areas of major decision-making in society.”

However, she is critical of how some of the policies implemented to stop the spread of coronavirus have been communicated to the public, with a lack of discussion about their context leaving people to read between the lines when interpreting official guidance.

“There was a lack of understanding of just how much communication there needed to be about the way that evidence is used in decisions,” Brown says. “The crisis isn’t just the disease spreading – the crisis is also how people are reacting to and understanding it.”

She is also sceptical that measures to remove conspiracy stories from social media platforms will have the desired effect. Ofcom research on news consumption found that, in early April, half of people were seeing misleading information about the virus on a weekly basis. Brown warns that simply removing misinformation does not adequately solve the issue.



“People do not achieve engagement and trust by shutting down their opponents,” she says. “If you want to get rid of misinformation, you need to think about what you put in its place and how you equip people with the right questions that help navigate the evidence.”

One of Brown’s biggest frustrations, more generally, is the lack of engagement from researchers in how their work is promoted – particularly in the early stages of a project – which can risk the end results being misused in wider debates happening across society. To counter this, Sense about Science works with research teams on projects of potentially major public interest and helps them to run engagement programmes about their findings.

“I think the research community thinks about public engagement as the thing you do once you have finished your project, rather than a conversation you begin earlier,” she says. “It astonishes me how researchers can just release information. Researchers will say that their work has been massively misinterpreted and really polarised, and you think ‘they must have looked around them at the debate that this research was going into and seen there was a hunger for stories of that nature’.

“Now is the time to think a lot more about what kind of questions you would want people to ask, and engaging the world more in the research question rather than the research answer.”

Behavioural friction



Research into habits and daily routines finds that the easier a behaviour is to do, the greater the chance that a new habit will be established. When we're establishing a new behaviour, we have to consciously think about doing it, which takes more effort and can make it seem harder to achieve. Minimising barriers so that it feels less daunting can facilitate the process of building a new habit.

Yet, with so many contextual variables currently in flux as restrictions related to Covid-19 change week by week – differing by country and even region – and with many consumers feeling cognitively strained, overwhelmed or anxious, there is more behavioural friction than ever.

Friction can get in the way of desired behaviour, but it can also be engaged to discourage undesired behaviour and steer towards the behaviour you want to happen.

Analysing existing friction

It's important to identify the behavioural friction in people's lives that might be preventing them from adopting a new behaviour.

In 2018, a team of researchers used data from a cycle app to analyse commuter cycle routes across three European cities: Munster, in Germany; Castelló, in Spain; and Valletta, in Malta. The data enabled them to identify journey 'friction points' – where cyclists had to stop, slow down, switch routes from a designated cycle path to a highway, or even get off and push. These points in the journey mean a cyclist has to be constantly alert to the next hazard or navigation point, making the journey slower, creating fear and frustration, and even discouraging cycling altogether. As cities the world over rapidly redesign their road networks to give more priority to cyclists during the pandemic, this sort of data analysis is invaluable.

Today, we can find multiple examples of friction. Some governments are failing to communicate the virus rules and guidance in a consistent way, or have not made clear that scientific understanding is an evolving entity, so advice will change and guidance will be updated as more is known. This has generated confusion across many business sectors, which is then deflected onto consumers. Friction caused by uncertainty and lack of clarity is likely to make people think twice about certain activities when they are worried and unsure about the right thing to do.

Reducing friction for a desired behaviour to happen

Once friction barriers have been identified and analysed, the next step is to try to minimise or eliminate as much friction as possible, to make a behaviour easier to do. Some of the best strategies to do this include:

- **Reducing the number of decisions:** the easier the set-up, the more likely we are to at least begin the new behaviour. How many decisions are you asking someone to make before they can begin? Are they likely to know or easily find the answers, or will the decisions confuse and discourage them?
- **Reducing the steps required to carry out the behaviour:** embarking on new behaviours and actions can seem daunting. If the steps required for the routine are simple and minimal – a three-step process at most, for instance – it's more likely someone will try to adopt it
- **Reducing the perceived effort or any other potential barriers:** changing the status quo and starting a new behaviour is always going to feel like more effort, but if we can reduce any known barriers to the routine, we have more chance of success.

A study published in July 2020 provides a good example of the first strategy, to reduce the number of decisions required. Researchers found a significant impact on green electricity (100% renewable) take-up in Germany by automatically enrolling households into tariffs. A default green tariff led to an increase in green electricity consumption of almost 20%. Previously, other

information-based or switching campaigns had failed to affect household tariff choice. Although households remained free to opt out, few did so. Making it easy – the default or automatic choice – to use green energy helps reduce any existing friction in choosing to draw on renewable energy sources.

Contactless payments have played a big part in reducing friction lately, making it easier to pay for items and services, as well as maintain hygiene and physical distancing. More and more outlets are now offering contactless and a higher maximum threshold (£45 in the UK and €50 in Europe) for payment. This means that far more payments can be made using contactless, embedding the new habit more quickly. The Covid-19 pandemic has changed people's preferences, with 59% of those surveyed saying contactless is their preferred choice of payment.

Analysis of contactless uptake by Dynata found that there seems to be spillover effects from using contactless. In the past, enabling contactless payments on public transport – Transport for London (TfL) in the UK and metro networks in Sydney and Singapore – triggered wider usage. It's not clear exactly why, but it could relate to reducing friction barriers. Similarly, this push to use contactless now may drive continued usage even when virus risk levels fall.

While this behaviour has been driven by making it easier to use contactless, at the same time during Covid-19 it has become harder to use cash – simply because many vendors do not want to handle it because of the hygiene risks. Increasing friction can also be a useful strategy for driving new behaviour.

Discouraging undesired behaviour

How might we increase friction to stop or reduce undesired behaviour? One 1981 study looked at how to reduce elevator use in an office building, with the objective of cutting energy use. Researchers found that simply making the elevator doors close extremely slowly was enough to prompt many people to take the stairs – for good.

There was a marked reduction in use of the elevator when the doors took the longest to close, but even when they returned to their original speeds, people stuck with the stairs. They had developed a new habit, driven by increased friction. Most people detest waiting and would rather be on the move, even if that means more physical effort. Making something

feel time-consuming helped to drive a more active behaviour.

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“Simply making the elevator doors close extremely slowly was enough to prompt many people to take the stairs – for good”
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Implications

- With our lives upturned for months on end, we have a 'once in a generation' opportunity to shape and drive new optimal behaviours
- One of the most effective ways to encourage people to try new routines, services or products is by making it as easy as possible to do the desired behaviour, or by making the old behaviour harder to do
- Understanding the barriers and friction to behaviour is key to designing successful strategies for new behaviours.



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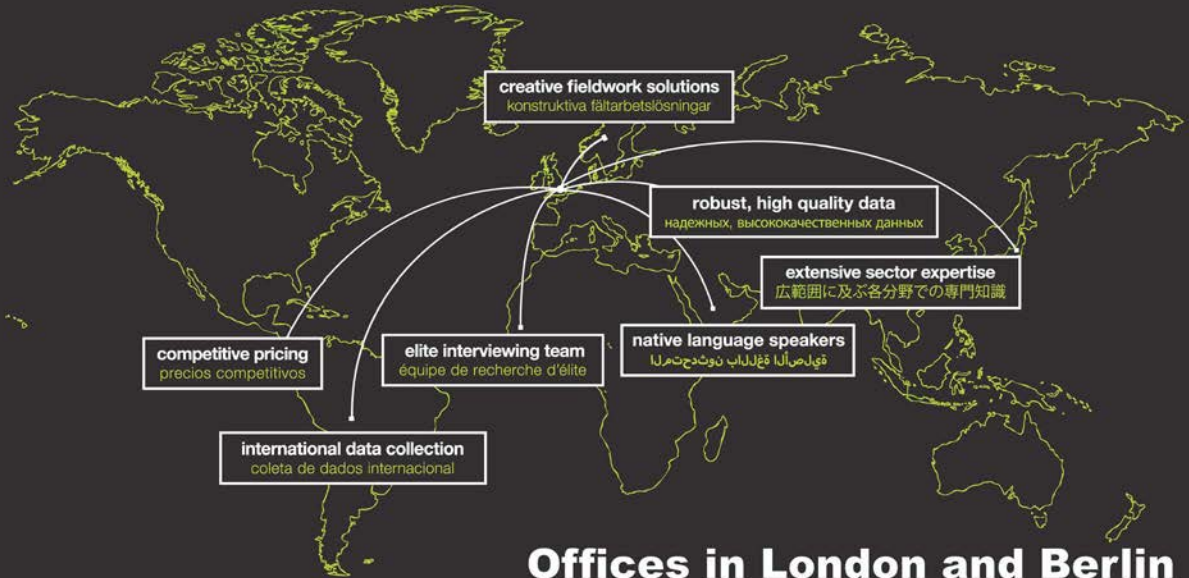
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Role reversal

Olu Odubajo, customer and digital consultant at KPMG, co-led the organisation's pilot reverse-mentoring scheme. He talks about the programme, accountability, and the importance of listening to employees

What is the background to the reverse-mentoring programme and what are its aims?

The black heritage reverse-mentoring programme involves more senior employees gaining insights and understanding from more junior employees about their experiences and day-to-day life at KPMG.

A pilot kicked off in 2017 with a smaller subset group, based on feedback from our Afro-Caribbean network and our employees about their experiences, and how we could better engage the partner community to help us build a more inclusive culture. We got lots of really positive feedback, so we started the formal version of the programme in March 2018.

I was the first mentor on the pilot programme, mentoring the firm's then managing partner – and, now, global chief operating officer – Philip Davidson, on what it was like being a black colleague at KPMG. I was responsible for co-leading the pilot programme, along with the Afro-Caribbean employee network.

As the feedback was really positive, we required more resource to roll it out more broadly and make sure we were engaging with as many people as possible across the firm. So, we partnered with the inclusion and diversity team and our UK learning team to look at how we could better structure the programme, make sure we had sufficient budget, and publicise it, to get more people on board. My vision was to see 100 partners being mentored by 100 ethnic minorities across the UK firm – and I'm glad to say we achieved above and beyond this.

What role did research and data play in your contribution to the programme?

I did a lot of research, collecting data and informally interviewing black and minority ethnic

colleagues and friends about their experiences in the workplace. Through internal and external research, I identified a number of potential issues, including unconscious bias, a lack of senior black role models, the difficulty of being 'heard' at work, and too few opportunities to get picked for high-profile assignments – issues that can be hard for leaders to see because they get 'translated' as they go up the chain. This gave me a solid foundation to understand the barriers to career progression and discuss with my mentee, and the firm's leadership, what they can do to remove these.

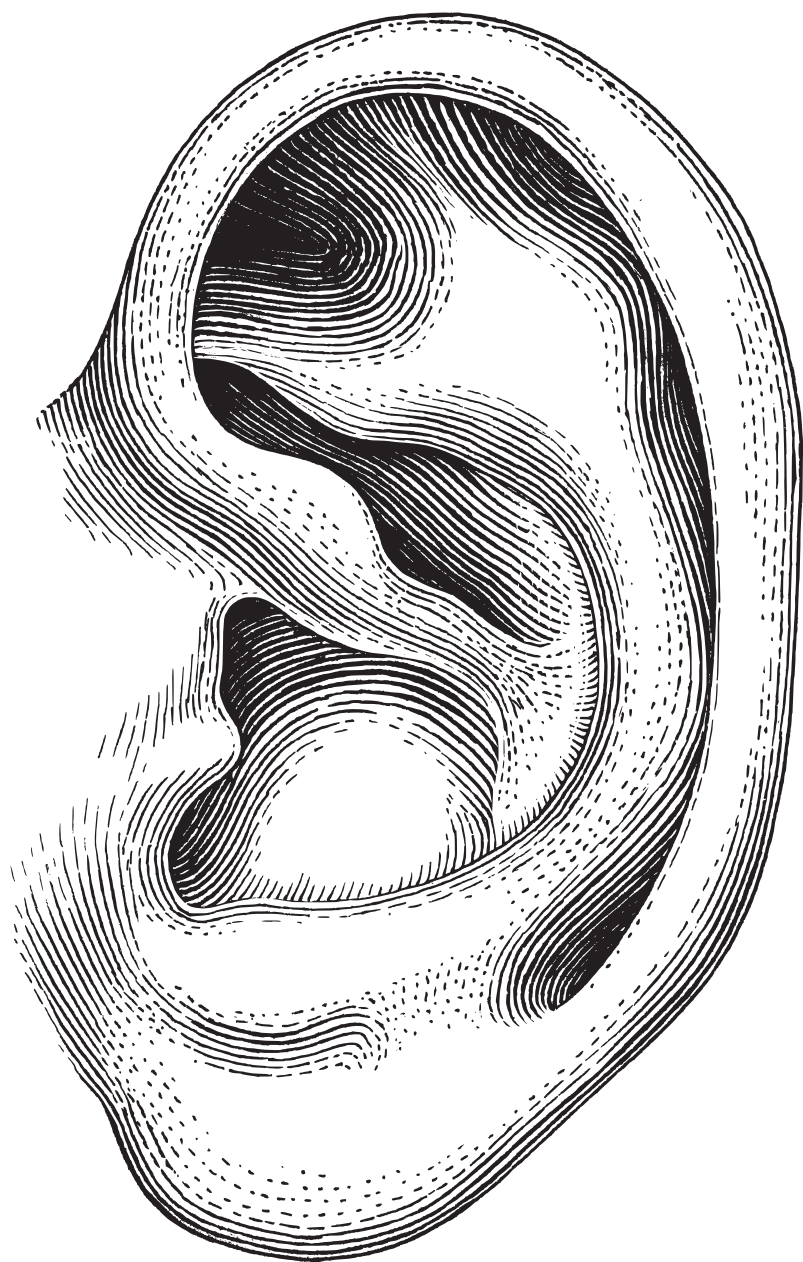
How was your experience of the process?

In the past few years, I have had the chance, through the programme, to talk to senior partners and colleagues, take on public speaking engagements and presentations, and represent the firm at the One Young World conference in Colombia and the Netherlands. The programme has been life-changing, and I've grown in confidence. Now I know that people want to hear what I have to say, I feel a lot more comfortable to be myself. I have really reflected on what it is I want to be doing within the organisation – I have changed teams and roles. Reverse mentoring has also increased my network and exposure within the firm.

I interviewed Philip Davidson about our reverse-mentoring experience, and how it had helped his view on diversity, for my podcast, *Not Your Everyday Podcast*.

How can companies make sure employees' experiences and voices are not being lost?

Reverse mentoring enabled junior employees to feel more of a sense of belonging to the organisation, and as if their voices are being



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“Reverse mentoring often challenges the hierarchy... for a lot of people, it is the first time somebody more junior is driving the relationship”
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heard – it also helped build a sense of community. As a firm, we understand that some of our diverse colleagues in the organisation don’t have as much direct exposure to partners on a day-to-day basis, and we realised there could be a disconnect between what partners think the culture is like and the experience of those at more junior levels.

We wanted to focus on how we can bridge that gap and create a culture of inclusion. We realised that a better way to do this would be for senior staff to just hear directly from those colleagues in a way that will build a sustained relationship over time.

One of the key benefits was that it put junior colleagues in contact with quite senior people with whom they may not have worked previously. This additional exposure has proven beneficial, not just to their day-to-day jobs, but also with regards to specific skills needed on individual projects. So, it was also a way of creating a form of traditional mentors or sponsors.

Can reverse-mentoring schemes help organisations become more accountable?

Reverse mentoring often challenges the hierarchy and power relationships within an organisation. For a lot of people, it’s the first time somebody more junior is driving the relationship. It also has a positive impact on wellbeing, because it allows more junior employees to feel that their voices are being heard, giving them more power to affect change.

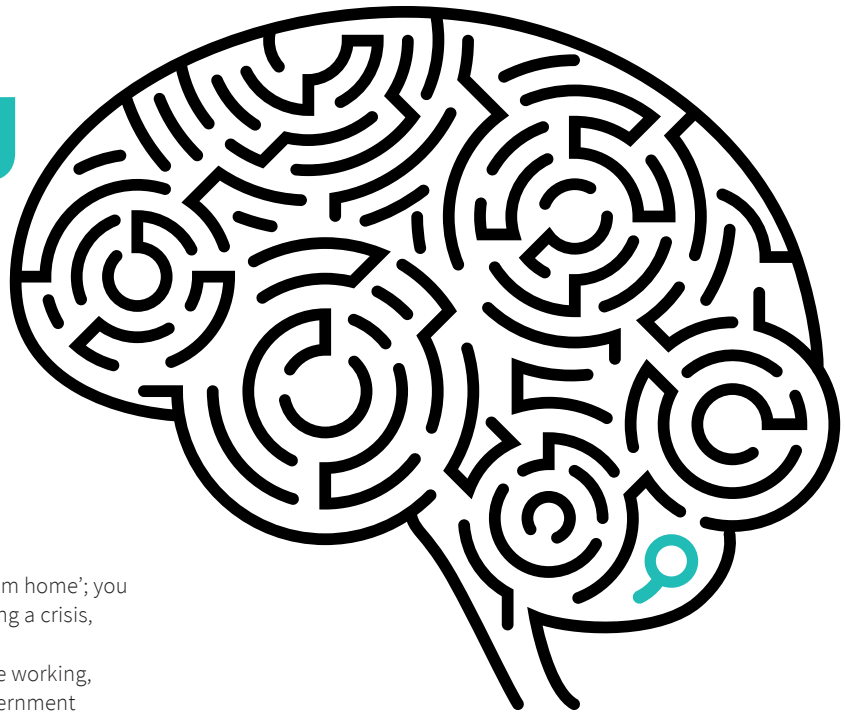
For more senior employees, I think it enables an increased connection with how the firm is working on the ground. Things you maybe take for granted in terms of the culture must be reviewed continuously, so this type of engagement has a really positive impact in terms of accountability for change.

What advice would you give other businesses thinking of establishing similar initiatives?

First, listen to black employees about what their experiences have been in the organisation and then take action to address issues that arise. To promote an inclusive culture, you need to take a real, honest look into what your organisational data tells you about your colleagues’ experiences and progression, and prioritise what needs to be done to reverse negative trends or improve the pace of positive trends.

Working well

Opinium has conducted a survey on the industry's mental wellbeing, providing indicators of how researchers are coping with a challenging year. By Katie McQuater



“You are not ‘working from home’; you are at your home, during a crisis, trying to work.”

As organisations moved to remote working, guidance issued by a Canadian government agency to its employees was quickly shared on social media networks. It’s a distinction to which many will relate.

Whether you are a parent juggling childcare with your job, jostling for workspace with housemates, or feeling isolated without the presence of colleagues, working remotely is not without its struggles for mental wellbeing.

The good news is that the importance of looking after our emotional health has risen up the agenda in recent years, with charities, governments and forward-thinking organisations taking the lead.

For the second year running, Opinium has conducted a study on mental wellbeing in the market research industry, supported by MRS. The results of the survey of 1,143 UK researchers, sent out by MRS to its database, suggest improvement in people’s openness to discussing mental health and acknowledging issues.

More than half (57%) of those who reported experiencing mental health struggles said they had told someone in their workplace about it, compared with more than a third (36%) in the first survey conducted in 2019.

Last year’s research found that 40% of respondents said they didn’t take time off because they didn’t think their mental health issue was a valid reason to do so; however, this year, the figure was lower, at 28%.

Additionally, two-thirds (66%) of respondents said they feel their current workplace takes the health and wellbeing of employees seriously – an

increase from 56% last year. However, the proportion of respondents reporting that they had struggled with their mental wellbeing remains high – 83%, compared with 85% in the 2019 research.

This research is all the more pertinent in 2020. With the UK entering a recession for the first time since the 2008 financial crash, and the pandemic forcing an overnight change in the way most businesses operate, the industry is under pressure.

Covid-19 is one of the top stressors identified in the research. For 40% of respondents, the impact of the pandemic on the company was one of their key sources of stress at work – third after workload and deadlines.

“It’s a pivotal moment for our industry and society as a whole. Covid-19 has impacted not only the way we live, but our expectations of, and priorities for, the future,” says James Endersby, chief executive at Opinium.

The study uses the Warwick-Edinburgh Mental Wellbeing Scale, a method designed by the University of Warwick with funding from NHS Health Scotland. These scores remained stable this year compared with the 2019 research, despite the pandemic; the overall score among those in the market research industry was 46.1, compared with 46.3 last year.

For some in the industry, working from home has been a positive experience. For example, 62% said that not having to commute has improved

their mental health and 59% reported that they are more relaxed. However, almost half of respondents (48%) found it hard to draw boundaries between work and rest, and 28% said it was harder to keep in touch with their colleagues.

There was some division over the effects of working from home during the pandemic – 37% said it has improved their mental wellbeing, while 33% said the opposite.

Despite its challenges, there is an appetite for remote working among a vast majority of respondents, with 96% wanting to continue working from home ‘in some capacity’ in future.

“People who are offered flexible working hours have higher mental wellbeing versus those who are not. We see that with most of the initiatives, but some have more impact than others,” says Sophie Holland, senior research executive at Opinium.

“Having an individualistic approach to how we return to offices, and taking everyone’s individual circumstances into account, is important. The pandemic hasn’t gone away – it’s about employers being mindful of that going forward.”

Recommendations

Opinium has developed three recommendations for employers; the first is that companies should not get complacent. While the data shows that progress has been made in helping employees better manage their mental health in the workplace in the past 12 months, there are plenty of areas for improvement. For example, 31% of respondents said they wouldn’t know how to approach the topic of their mental health at work if they were struggling.

Where programmes and initiatives have been implemented – such as enforced mandatory breaks, mentoring schemes and ‘duvet days’ – the research found that employees have reported benefits to their mental wellbeing. The report recommends that organisations continue to offer such initiatives or consider introducing them.

Opinium has also recommended that employers learn from lockdown and consider making some of the temporary changes to working patterns permanent, to allow for greater flexibility.

Endersby says: “Our response to the challenges posed by the crisis – to the pressures and concerns they place upon both the mental and physical wellbeing of our colleagues and friends – will continue to have widespread and long-lasting repercussions.”

A mindful approach

The Mindful Business Charter was developed in 2018 by companies in the financial and legal sectors, with the intention of removing unnecessary sources of workplace stress and promoting better mental health and wellbeing at work.

The framework provides a set of behavioural principles to reduce avoidable stress. It is based on four pillars: openness and respect; smart meetings and emails; respecting rest periods; and mindful delegation.

Examples of principles in the framework include:

- Discuss with colleagues, clients and contacts their preferred method of communication
- Be respectful of others’ time by planning meetings properly
- Avoid over-use of email and don’t copy people into emails they don’t need to receive
- When sending emails outside of business hours, be clear in the title whether it needs to be actioned promptly or consider sending pre-timed emails (so emails are not received late at night or at weekends).

Firefish Group recently signed up to the charter. “It provides a practical, flexible framework to reduce unproductive stress and support the wellbeing of the whole business – and I hope, in time, some more of our clients,” says group chief executive Jem Fawcus.

“Unnecessary stress is completely counterproductive for everybody. A productive business is not a stressed business.”



Essential safeguards



Along with a revised code of conduct published in October 2019, the MRS standards team has continued to create and update specialist guidance notes to provide detailed interpretation and application of the code to the insight sector. Most recently, this has included Covid-19 resources and the introduction of an essential safeguards series of guidance, with the aim of guiding our members in the prevention of harm – a key construct of the MRS code.

The subjects of the first two guides in this series are:

1. Dealing with discriminatory comments

Many of us have witnessed or experienced discrimination at one time or another. Often, people do not challenge this behaviour because they do not want to be a target of abuse themselves. Discrimination can take many forms, including:

- Verbal and physical abuse
- Bullying
- Threatening behaviour
- Online abuse.

Standing up to discrimination can be a powerful sign of support. It can also make the perpetrator think twice about their actions. When responding, always assess the situation and never put yourself at risk. Your actions do not need to involve confrontation.

Rule 9 of the MRS code of conduct: members must take all reasonable precautions to ensure that participants are not harmed or adversely affected by their professional activities, and ensure that there are measures in place to guard against potential harm.

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

Taking reasonable action

The example of data collection in a face-to-face qualitative

research group setting is used in the following guidance, which would also apply to other data-collection and professional activities.

Keep an open mind – discrimination situations are often very individual, and what may, or may not, be felt to be discriminatory can change over time, and from person to person. However, immediate action should be taken if discriminatory comments have been directed at a member of the group.

Be respectful and empathetic to the person to whom the comment was directed and others in the group – it can be particularly upsetting and/or stressful to experience or witness discrimination. The use of discriminatory language can have a very harmful impact on the mental health of victims. Think about how you can support the target of the abuse. Go and sit or stand next to them, and check if they wish to continue.

Say something – calling out discriminatory behaviour in front of other people lets the whole group know that behaviour is unacceptable. Be aware that people tend to be defensive when they are called out in front of others. Unless agreed otherwise by all the other members of the group, individuals who use discriminatory language should be asked to withdraw. The group can then continue if those remaining are willing to do so.

Tell someone – report the incident to the appropriate person at your place of work. Call the police if you think that you or somebody else may be in danger.

2. Bullying and harassment

Everyone deserves to be treated with dignity and respect. Bullying and harassment is unacceptable, and constitutes a violation of human and legal rights that can lead to criminal prosecution and civil law claims.

Bullying and harassment undermines physical and mental health; possible consequences include:

- Insomnia and inability to relax
- Loss of confidence and self-doubt
- Loss of appetite
- Hypervigilance and excessive double-checking of all actions.

Legal and regulatory obligations

Bullying can take many forms and is defined largely by its impact,



rather than its intent. There is no specific legal definition, but it is generally unwanted behaviour that offends, persecutes or excludes someone.

Bullying itself is not against the law in the UK, but harassment is. The UK's Equality Act 2010 defines harassment as unwanted conduct related to one of the following protected characteristics: age; disability; gender reassignment; race; religion or belief; sex; and sexual orientation. It is, therefore, unlawful.

In addition to Rule 9 of the MRS code, rule 37 states: members must ensure that participants (including employees in employee data-collection projects) are not required or pressured to participate in any projects.

What is bullying?

It is important to realise that bullying and harassment are words that are frequently used without a shared understanding of what they mean. They are also often used interchangeably. However, there are subtle differences in the definitions to reflect how these negative behaviours may manifest themselves. Examples of bullying include:

- Sadistic or aggressive behaviour over a period of time
- Humiliating or ridiculing others or criticising others in public
- Cyber-bullying conducted via social networking channels
- Persistent, unwarranted criticism of others in private
- Treating colleagues as if they are incompetent
- Excluding colleagues from activities
- Preventing colleagues from progressing.

This list is not exhaustive: remember, bullying is any behaviour that is unacceptable to an individual or causes them distress.

Taking action

If you have witnessed or experienced bullying in your professional activities, it can be difficult to decide what to do. There are several approaches and you should consider with which option you feel most comfortable:

Talk to others – it is often helpful to talk informally to friends, family, trusted colleagues, or a workplace counsellor. Report the matter to your line manager if appropriate.

Keep a diary – if there is a problem occurring over time, it is crucial to keep a detailed written record of incidents. This will clarify exactly what is happening and provide vital evidence.

Speak up – consider speaking to the perpetrator directly. It can be very effective to tell the person to stop and explain that they are causing distress. Their behaviour may be unintentional, and they may stop if they are made aware of the effect it is having. Take a calm but firm approach and make a note of everything that is said, either at the time or immediately after.

Additional resources

Equality and Human Rights Commission:
equalityhumanrights.com/en

National Bullying Helpline: nationalbullyinghelpline.co.uk

Anti-Bullying Alliance: anti-bullyingalliance.org.uk

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Pause, reflect and act

Every autumn, MRS produces an annual review of the past year (you can see it at mrs.org.uk/annualreview). It was a useful exercise as it reminded me of how much we have done in the past few months to support the sector in this time of dire need. It also made me realise how much has changed, probably forever.

In March, having delivered a hugely successful Annual Conference in a new venue, we rapidly pivoted to the digital delivery of all services. This from our new workstations in bedrooms and on kitchen tables, while bouncing babies on knees and, in some cases, as we shielded the vulnerable. Particular credit is due to our training team who, in just a couple of weeks, re-platformed a complex **year-long programme of face-to-face training** into a very successful virtual mode.

By the end of the month, we had already started to lobby the chancellor Rishi Sunak and ministers plus relevant civil servants to support the research sector and highlighted the catastrophic impact that lockdown would have **on face-to-face research**. We rapidly built solid foundations that would stand us in good stead for the ongoing turbulence that we are still experiencing.

When I say 'we', I am talking not just about MRS, but the research and insight sector as a whole that – as our forthcoming **Delphi Group report** will

show – has created for itself a new reputation for delivering agile, pop-up research and insight in a way that we could never have anticipated. Even before the pandemic, the reporting year was already characterised by a large degree of caution in the market, driven in part by the Brexit transition. In spite of all this, MRS corporate accreditation has grown, especially among client organisations.

We entered the second year of our diversity and inclusion programme and numbers in the **CEO Inclusion Pledge** continue to grow, and, with the support of our sponsor YouGov, we launched the MRSpride Award for Inclusive Research in January.

The **MRS apprenticeship** work programme, which is so important for helping social and ethnic minority representation in the research and insight sector, has made good progress; we're well on the way to finalising the scheme this year. MRS continues to build on the strong relationships we have with **The Research Society (AUS) and the Insights Association (US)**, expanding our already considerable international reach into the future.

I would like to thank all those who continue to support MRS in so many ways. Rest assured that MRS will continue to support our members and the sector as we struggle with the ongoing economic fallout from the pandemic.

Sector and MRS news

Tripartite agreement

MRS has signed a tripartite agreement with the Insights Association of the US and the Research Society of Australia. Collaborative activities will include the internationalisation of the CEO Pledge and a sharing of resources for improving diversity.

MoU with CORe

MRS has made a landmark agreement with the new network CORe to support its endeavours to improve the representation of ethnic minorities in the research sector.

Government procurement

New procurement opportunities are available with the Cabinet Office, which has launched a tender for all qualitative research over the next two years to suppliers on the Research Marketplace Dynamic Purchasing System (DPS). The Cabinet Office is keen to receive bids from across the sector, including from SMEs. See more at mrs.org.uk

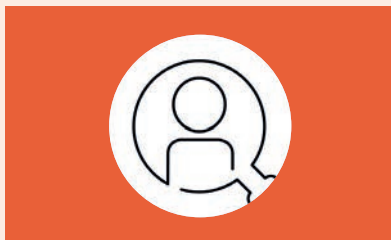
Post Covid-19 guidance

MRS has published new guidelines for returning to work, including face-to-face research activity. These build on the government's safe working guidance setting out measures research professionals should take.

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

CPD



Update and track your skills with CPD

Continuous Professional Development (CPD) is a formal way to take control of your skills and career. It encourages you to think about any knowledge gaps and enables you to record your learning and development. As a member you can use the online CPD portal to track your achievements for training, qualifications, conference attendance, reading and authorship. CPD is also a useful pathway to upgrade to Certified Membership.

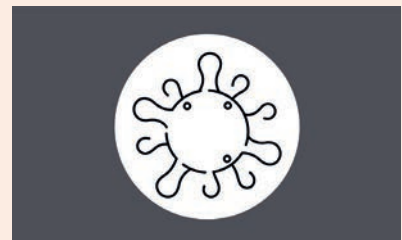
Recruiter Accreditation



Become an Accredited Recruiter with RAS

The new Recruiter Accreditation Scheme (RAS) has been developed by MRS and the Association for Qualitative Research (AQR) to raise the profile and status of recruiters. The scheme provides training and accreditation that recognises the knowledge, skills and competence of recruiters. MRS members are eligible to take the online assessment and become Accredited Recruiters using the recognised RAS logo. Find out more at ras.mrs.org.uk

Coronavirus support



Specialist guidance and resources for researchers

We are committed to supporting our members and championing the needs of the wider research sector during the health and economic crisis. The policy team has developed a wide range of resources including guidance on face-to-face shopping, and data collection, as well as FAQs on face masks and PPE. Regularly updated, there is also a range of third-party resources recommended under the Coronavirus support section on the website.

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 truth about trust

Few of us would argue that trust is important – it underpins effective marketing, relationships, leadership and more. Tune into this webinar to hear the truth about this powerful emotion.

27 November

The real behaviour behind big data

Looking at the psychology behind the technology, this webinar unearths the real behaviour behind big data to help improve participation quality.

9 December

Virtual conferences

&more – Young Researcher's Virtual Conference

This sell-out event returns for its second year. Created for and by young researchers to initiate discussion, exchange ideas and provide a platform for the future.

8 October

Sustainability – Virtual Summit

Explore how the insight industry is supporting businesses and individuals to deliver attitudinal, behavioural and systems change.

5 November

Storytelling – Virtual Summit

Join storytelling experts to hear how structuring research and insight within a storytelling framework will boost impact, understanding and buy-in.

12 November

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 continuing for much of the sector, our conferences and training courses are virtual until at least the end of 2020.

Financial Research – Virtual Summit

Take a deep dive into how the Covid-19 pandemic has led to a seismic shift in consumers' financial attitudes, behaviours and needs, and what this means for the future of research.

19 November

Online courses

Consumer Psychology

Understand consumer motivations from classic theory to current thinking in consumer psychology, neuroscience and behavioural economics.

8 October

Introduction to Qualitative Research

Understand the role of qualitative research in contemporary insight and its general application including the processes, planning and methods involved.

12 October

Econometric Modelling and ROI

Gain an understanding of the principles of econometric modelling and how this approach is used to calculate the ROI of marketing activities.

13 October

The Science of Behaviour Change

Behavioural science is now a must for anyone interested in the business of changing behaviour. Get the latest thinking from this course.

14 October

Applying Machine Learning to Data

This course provides a technical introduction to machine learning – the science of training computers to act without explicit programming.

15 October

Putting Insight into Business

Gain insight into what keeps senior decision-makers awake at night and how to solve commercial pressures with effective business models and processes.

19 October

Essentials of Quantitative Research

This three-day course builds a full understanding of the quantitative research process including data collection and analysis techniques through to presentation and conclusions.

20-22 October



Margaret Heffernan is an entrepreneur and writer who has been chief executive of several businesses. The author of six books, and a Ted speaker, she mentors senior leaders and is professor of practice at University of Bath School of Management

1 How can businesses prepare for the future at such an uncertain time?

The first step is to understand how little of the future can be predicted with accuracy. The second is to understand the difference between work that is complicated – which is linear and where all factors and influences are known and measurable – and the complex, which is non-linear, multifactorial to a degree that all factors can't be seen at once, and subject to immense change, so expertise can't always keep up. You should appreciate that the complex is made more dangerous with efficiency and needs human judgement, and the complicated should be optimised for efficiency to free up resources, time and attention for the complex.

2 What can Covid-19 teach us about resilience?

That running entire systems for efficiency amplified dangers and costs. That is one consequence of treating everything as though it should be optimised for efficiency. Resilience in complex systems lies in robustness – having more than you think you need. One reason Germany did so well in the crisis is that its healthcare systems always had excess capacity. Resilience is also maximised if you have built, and sustained, deep, wide networks of trust and social capital; these will prove generous and responsive in times of

crisis. In the UK, the absence of any social capital between government and the medical and scientific communities made decision-making difficult, faltering, slow and lacking in credibility.

3 What constitutes good leadership in times of uncertainty?

Good leadership is consistent, competent, benevolent and manifests integrity. Organisations going into a crisis with these qualities can emerge even stronger after. It's important never to appear more certain than is possible. Don't reassure with wished-for, but unpredictable, outcomes. Don't make promises you aren't 110% confident you can deliver. Be transparent about what you do and do not know, and remember: people will forgive decisions that play out badly if you can explain why and how the decisions were made.

4 Are senior management teams paying enough attention to research?

They pay very little attention to research, except into the technical matters in the industries they are part of. In terms of leadership or management research, almost no leaders or managers read academic research into these areas.

5 What is the role of insight in addressing a lack of diversity in business?

Insight is helpful anywhere, but only if

accompanied by coalition building and action. My own view is that we have spent decades paying lip service to this idea, with very few organisations achieving very much. If we are serious about building organisations that look like the society we serve, hard decisions will need to be taken that, to date, have mostly been shirked.

6 Do you feel the modern workplace has become more open to greater debate and exchange of viewpoints?

No. In general, research shows that employees have many issues, concerns and ideas that they do not voice. That is a theme in my book *Wilful Blindness*. When things go wrong, it isn't because no-one knew, but because nobody did anything.

7 What will be the greatest management challenge in post-Covid-19 workplaces?

The big issue will be legitimacy. Companies benefit from massive public goods – safety, the rule of law, education, health and transportation systems. To the degree that businesses are seen as takers from society, rather than givers, I think the public mood will turn against them. The relationship between organisations and the society they serve needs to be more dynamic, humble and open if we are to use the immense power of organisations to address crises.

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