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Hiding in plain sight



Cautious: *Succession* spoiler ahead. If you are invested in the hit drama about a media family's machiavellian power struggles but haven't yet seen the finale, stop reading now.

The series played out the consequences of unresolved intergenerational trauma mixing with obscene wealth and the desire for power. But in the end, it was the outsider Tom Wambsgans, the social-climbing and continually mocked husband of Siobhan Roy, who emerged as the new chief executive of Waystar Royco, usurping the three Roy siblings.

It's a story about how the truth can be hiding in plain sight: after the episode aired, fans took to internet forums to talk about how Tom's success was foreshadowed from the beginning of the four-season show. That's the privilege of hindsight: it allows us to look at things with a fresh perspective and to understand how what happened then, influences now.

But what has this got to do with insight, you ask? Well, there is one major technological development that has been on everyone's lips for the past few months, and has made it into quite a few pages of this issue, too: the adoption of generative artificial intelligence (AI).

While it has prompted handwriting in some sectors, researchers are experimenting in spades and remaining pragmatic about the useful role the

technology can have, helping practitioners play to their strengths.

I sometimes think that our very human critical and creative skills are in fact hiding in plain sight – when we see or use something every day, we tend to take it for granted. We perhaps underestimate it, like the other characters underestimated Tom in *Succession*. I'm not suggesting that AI is to be brushed aside – on the contrary, the sector must take it seriously. But as our data analytics columnist Bethan Blakeley points out (p41), AI may be smart, but context and intuition are pretty important, too. But when everything is running smoothly, you don't always stop to notice how effective it is.

As this issue's report (p20) explores, the sector – like many others – is facing a skills shortage. The report investigates the challenge facing the sector and why focusing on recruitment, retention and culture will ensure our business continues to flourish. Because what is research without its people?

And on page 42, we catch up with Kenny Imafidon, founder of ClearView Research, who posits a future in which researchers could envision different realities, saying: "It's very important to understand the power of 'what is', but we should still be able to dream and ask: 'what could it be?'" In an uncertain world, it is researchers, not AI, who will ask that question.



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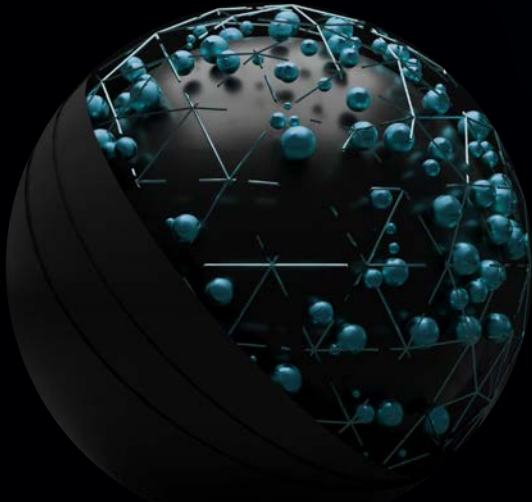
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Looking for luck



One of the distinctions I am most eager to make in my writings is that between bottom-up lateral discoveries and top-down, intentional, linear innovation. It seems to me that – in science as much as in business – the first has ultimately created more value than the second. Strange, then, that all institutions are very well designed to pursue the latter, but hopelessly ill-equipped to exploit or fund the former.

Here's Andre Geim, the co-discoverer of graphene, on his approach to science:

"I jump from one research subject to another every few years. I do not want to study the same stuff 'from cradle to coffin', as some academics do. To be able to do this, we often carry out what I call 'hit-and-run experiments'. Some crazy ideas that should never work and, of course, they don't in most cases. However, sometimes we find a pearl. This research style may sound appealing, but it is very hard psychologically, mentally, physically, and in terms of research grants too. But it is fun."

It really boils down to a question that seems silly at first, but on reflection has a rather wider importance: do you want to look clever and win arguments in advance, or do you want to get lucky and win overall in the end?

The large corporation and the bureaucrat lean heavily on the first option; the entrepreneur and the poker player on the second. The first is reductionist and logical, the second is probabilistic. The first is led by a plan, the second by an opportunistic insight.

To some extent, the first approach works well in operations, where you can control and measure everything of importance and set useful targets in advance. In marketing, with an ever changing playing field, and where you can – to some degree – rewrite the rules yourself, the second approach works. As a marketer, you will only ever know a fraction of what matters. Hence it is the freak outlier observation, not the aggregate data, that often provides the key to the problem.

Yet in any large business, or in any institutional setting, there is a certain narrow-minded logic that privileges the wholly logical approach. The price we pay for this apparent clarity is a complete narrowing of the fields of exploration. The only acceptable goals are those that have been defined and justified in advance.

The problem with this, as I have remarked, is that: "There are far more good ideas you can post-rationalise than there are good ideas

you can pre-rationalise." Or, as Harry Truman once said: "Anything is possible, just so long as you don't care who gets the credit." The desire for credit leads people only to rate success if it is achieved in precisely the manner laid down in their original plans.

Yet not only graphene, but penicillin and Viagra arose without a plan, as did the microwave oven and Wall's Viennetta (the result of a faulty, jerking conveyor belt on the production line, apparently). Recently there has been a breakthrough in immunotherapy; one of the most promising drugs is one that emerged from a failed research project to develop an immunosuppressant drug where the treatment had the opposite effect to that originally intended. Famously, Night Nurse was intended as a daytime flu remedy, but it had the unfortunate effect of sending its users to sleep. Only when a marketing person suggested repositioning it as a nighttime remedy – where its soporific effects were made a feature, not a bug – was it rescued from the failure pile.

In any complex system – and markets are undoubtedly complex, even chaotic, systems – the idea that you can work out what to do in advance is really a false god. But also, the experimental approach is often very cheap in comparison with the logical approach, which is why we should always experiment with a problem before we define it.

Remember that Andre Geim discovered graphene, a feat which earned him a Nobel Prize, using graphite from a pencil and Sellotape. No fancy laboratory was required at first – just a branch of Ryman's.

Now consider how much cheaper it was to create the London Overground than Crossrail. I would guess that it cost about 5% as much to rebrand the Overground from Silverlink Metro as it cost to build Crossrail. Yet annually they now carry about the same number of passengers – and the Overground does a better job of serving deprived areas of London. What seems to have been overlooked is that the Overground, which was scarcely used at all until it was included on the tube map (I know – I used it), has effectively created a £10bn piece of infrastructure using ink. By rebranding an existing network of lines, and making them comprehensible to users, many miles of pre-existing railway line were turned from near dereliction to a major part of London's infrastructure.

Crossrail is a logical solution. The Overground is an opportunistic, creative solution. Next time, before we leap to narrow logic, let's spend some time looking for a lucky insight.



“There are **7.97 million smartphone users** in Austria”

(p9)

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“Newly confident demographics are asserting themselves through soft power”

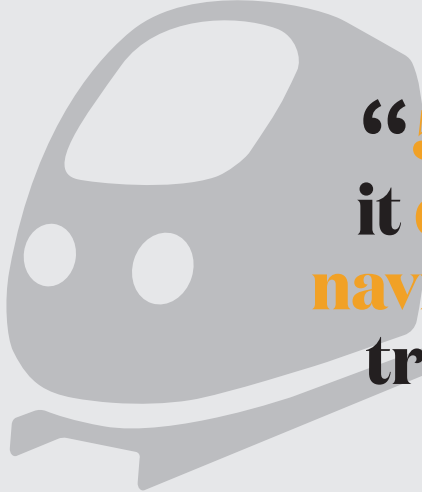
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“Travelling independently is a critical factor in improving quality of life”

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“**51%** found it **difficult to navigate public transport**”

(p12)



“There are **160 million** people aged **15 to 29** in **Latin America and the Caribbean**”

(p14)

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“Our main challenge nowadays is to cope with the coexistence of different realities”

(p10)

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Flipping the script

Video research on foldable smartphones with young people in Austria was used to inform Samsung product development globally. By Liam Kay-McClean

For anyone over the age of 30, flip phones are likely to be a positive memory from their relative youth, but a relic of the recent past. The phones were incredibly popular in the early 2000s, but the onset of the BlackBerry – and then the iPhone – effectively ended their market superiority and heralded their disappearance from mainstream mobile phone production.

That is until 2021, with the launch of Samsung's Z Flip3 and Z Fold3 foldable smartphones. Younger consumers had not had the experience of using the original flip phones, however, so Samsung wanted to know how the return of the foldable phone, married with the processing power of a smartphone, might be received by this group.

To help gauge the reactions of younger users, Samsung's Austrian insights team set up its own pop-up community among Austrian Gen Z phone users to test the potential mass market appeal of the foldable phones.

Austria's phone market posed another problem for Samsung that helped determine why its local team wanted to form the community: the company was facing a challenge to its audience share from younger challenger brands, such as Huawei and Xiaomi, while it was simultaneously aiming to overtake the country's most popular phone brand, Apple.

"We have a certain challenge with a young audience. We are tackling that with research and marketing activities," says Florian Bauer, head of consumer and market insights (IT and mobile communications) at Samsung Austria and Switzerland. "We are in a sandwich position. We see that across Europe, and that is the reality we are facing."

A 2021 product trial provided 10 young Austrians, aged between 16 and 24, with the



new foldable phones. The aim was to gather feedback on the customer experience of using foldable phones through a series of video diaries, starting with unboxing the phone and leading on to different 'micro moments' over a two-week period – capturing small moments during the day when the phone played a role in their wellbeing or happiness, for example, as well as demonstrating how it fared in everyday use.

"We didn't know how it would land," says Bauer. "There were foldable devices before this one, but it was difficult to estimate how they would be received by a young audience and the wider population."

Researchers learned a lot about the expectations of young people in Austria, but also found apprehension towards the new devices, particularly because of their unusual style and concerns over durability.

In the diary research covering the customer experience of foldable phones, Austrian triallists' use of the devices was able to counteract most of the doubts and barriers the participants had before using and receiving them. For example, the enjoyment of using the fold/flip element of the phones while creating videos and taking photos overrode practical concerns about how a foldable screen would fare over the short and medium term. "What we learned was that, over the two weeks, there were

powerful moments and triggers that delighted the users," Bauer explains. "They had durability concerns, and concerns about the features of the devices, and we could alleviate and counteract those."

The team understood which messages resonated with the phone users and why, and what was missing in Samsung's communications about the new phones. The results were widely shared within the company at its European headquarters in London and global headquarters in South Korea. The findings fed into an updated Flip4 model of the phones, which was released in 2022.

"It was very well received from the business because we had such rich data and footage, as [triallists] filmed themselves," says Bauer. "The findings were consistent with what we had seen and heard from others, so it made intuitive sense. It was nice, as it was a small piece of research in Austria that made its way to London – that doesn't happen a lot."

- Apple has a **44.33%** share of the Austrian mobile phone market
- Samsung's market share in Austria is **33.41%**
- Huawei has **7.7%**, Xiaomi **6.15%** and others **3%**

Source: Statcounter



Multiple realities

Russia's invasion last year rocked Ukraine and the world, but as people have adjusted to new realities in the country, research has also continued in the background.
Oksana Pleskova reports

I am Ukrainian, and I am eternally grateful to our army and all those who have made it possible for me to live at home, in my beloved city of Kyiv.

Each stage of the war brings new challenges to our lives and businesses. I've been conducting local and international qualitative market research for 27 years and I run my own small agency in Ukraine.

At the beginning of the war, marketing was far from being a priority. But as soon as businesses resumed work, they began to ask questions that only customers could answer, and our industry slowly began to revive.

Given the air raids and missile attacks, our first challenge was to ensure the safety

of respondents. We mainly conducted online, in-depth interviews, arranged to be flexible in case we needed to pause or reschedule the interview so a respondent could go to a bomb shelter.

The winter power outages were another challenge; we started doing more research offline, either at the office or in a cafe. It was a valuable experience that reinforced my belief that no technology can replace live conversations with people.

Fortunately, there are no longer any power outages in Kyiv, and air-raid sirens are becoming less frequent.

But even while the situation in Kyiv and much of Ukraine has improved a little, the war continues, with heavy fighting on the

front lines and shelling along the Russian border. Our challenges are now about reaching a more complex level of interaction between humanity, ethics and business.

Challenge one: Cope with the coexistence of multiple realities

When I was in Amsterdam recently, to speak at a conference, I received a call from a client in Germany, who said: "We have a request for a pack study in Ukraine. We were about to refuse the project, explaining to the client that people in Ukraine during the war were not up to discussing flowers on packaging. But I decided to call you first and ask what you think."

Foreign clients often assume that conducting market research in a warring country is unethical. I am continuously trying to persuade them of the opposite.

During the war we realised how



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“It is logical to think that now is not the time to talk to people about chocolate packaging or the taste of beer. But living in Ukraine, people really need that sense of a normal life”
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taste of beer. But living in Ukraine, people really need that sense of a normal life, so they gladly agree to take part in market research. Obviously, we are not talking about the occupied territories and regions on the front line.

Ukrainians have an incredible thirst for life. We live. We work. We create. We eat chocolate and we drink beer. And, at the same time, we fight. It's our modern reality.

Challenge two: Truly put people ahead of business

All Ukrainians have been wounded in some way by the war, and these wounds will not heal soon. We are sensitive and fragile, easily moved to tears, quickly offended and irritated.

We've already learned how to truly love and hate. We began to cry more frequently, but also to laugh more heartily.

I frequently reflect on how much more responsible the work of a moderator in qualitative market research has become, not only in terms of business, but also humanity. Indeed, our job has always been responsible because people open their souls to us, but now our responsibility increases.

Many marketers, researchers and moderators enjoy digging deep into people's subconscious, asking tricky questions to get 'deep insights', and so on.

Today, more than ever, we must be more empathetic. We must think twice about the consequences of questions that before the war seemed completely harmless.

We have to keep as neutral as possible when we hear an opinion with which we disagree, no matter how difficult it may be.

We have to support, sympathise and hug. Our work nowadays in Ukraine is not just about business. It is primarily about people and for people.

Challenge three: Relearn the local specifics

Ukrainians have impressed the world. Ukraine turned out to be a nation with many unknowns; difficult to understand even for ourselves, and certainly worth investigating deeper.

During the past 16 months of the war, our value priorities have changed: we develop new perceptions, behaviours and habits and we decode and interpret many symbols differently. For example, what image comes to your mind when you hear the word 'tractor'? Do you know what Ukrainians immediately imagine? We see a picture of a tractor pulling a tank captured from Russians.

So, it becomes crucial for marketers now to reinvestigate the target customers, their behaviour in a category, and their perception of brands and communications.

- **Category:** Have people's perceptions, needs and behaviours changed during the war? Are those changes forced and temporary, and will people return to their past habits at the first opportunity? Or are these changes long term – or even permanent?
- **Brand:** What do Ukrainians continue to appreciate about brands, even in these challenging times? Why do people leave brands and what do they find in the alternatives chosen?
- **Communications:** How are your brand identity and communications perceived nowadays? Consider that words, messages, visual codes and symbols may trigger different connotations today than before the war.

There is absolutely no doubt that Ukraine will cope with all the challenges it faces. So, start investigating Ukraine and Ukrainians now, to be better prepared than your competitors. And welcome to Kyiv.

● **Oksana Pleskova is owner at Mustang Research and Consulting**

multidimensional the world really is. Our main challenge nowadays is to cope with the coexistence of different realities.

On the one hand, Ukraine is experiencing a terrible tragedy. For more than a year, almost every day we have seen violence, death, destroyed cities and destroyed lives.

On the other hand, Ukrainians – together with our allies – have been doing everything possible and impossible to stop this invasion and live a normal life in our land.

People abroad typically see one side of the coin. For foreigners, Ukraine is now associated only with the terrifying military reality. But Ukraine is a really big country and, in 80% of our territory, people are doing everything possible to live a normal life.

Looking from abroad at the tragedy that Ukrainians are experiencing, it is logical to think that now is not the time to talk to people about chocolate packaging or the

Inclusive journeys

Research from RNIB and 2CV has focused on improving the accessibility of public transport for people with sight loss.

By Harriet Bird and Abigail Plank

How was your journey today?

Travel is an essential part of everyday life – but it's not just getting from A to B. It's about earning an income, catching up with friends and family and exploring new places. It's the bridge that connects us to the wealth of experiences the world has to offer.

For blind and partially-sighted people (BPSP), travelling independently is a critical factor in improving quality of life and achieving a sense of autonomy. People with sight loss are unable to drive, so for journeys that cannot be made by walking, they rely on public transport, taxis, and lifts from friends and relatives. With a breadth of accessibility issues, however, using public transport can be a daunting experience for people with sight loss.

Sight loss charity RNIB believes that accessible design is better for everyone: creating solutions to barriers can deliver a greater sense of independence and an improved public transport service for all. With funding from charity Motability, RNIB was able to dig deeper into the unique challenges of journeys made by people with sight loss through an in-depth programme of research.

This research involved a client-agency partnership in which RNIB conducted some of the research in-house through its ongoing 'voice of the customer' programme and brought in 2CV for the ethnographic study. There was a high response rate to participation in the research; the tracker survey usually gets around 400 responses, but this round received 512 – which made recruitment a more straightforward process than expected and, crucially, highlighted just how important this

research, and its aims, are perceived to be among people with sight loss. The research programme comprised:

- **Quantitative:** Telephone interviews and online surveys with 512 BPSP
- **Qualitative:** Six focus groups and 10 travel diaries with 18 BPSP
- **Ethnographic study:** Digital and face-to-face ethnographies across a range of journeys and transport modes across the UK with BPSP, followed by solutions-focused co-creation workshops.

Creating an accessible digital ethnography experience was critical to 2CV's approach. It invited blind and partially sighted participants to document journeys using a research platform with accessibility features, including high contrast mode, accessible rich internet applications (Aria) attributes, and offline access. The digital ethnographies being moderator-free meant that journeys could be as natural as possible, and they provided the opportunity for participants to independently tackle any travel disruptions and report back.

Beyond this, 2CV factored in several accessibility considerations, including: avoiding visual stimulus during workshops; co-designing questions with participants to inform future digital ethnography studies; and following accessibility guidelines for reporting.

Our research allowed participants to highlight the key challenges they face on public transport. Three findings stand out:

1. Travel is a hugely emotional experience

We all know that taking public transport can bring up a range of emotions. For BPSP, the fear of something 'going wrong' is felt more acutely. This means they rely much more



“Accessibility is not just the physicality of our surroundings, but allowing those with disabilities the opportunity to experience things that everyone else can”

Participant Gemma Harrison

heavily on advanced planning and a range of ‘workarounds’ or coping strategies that help them access public transport and feel in control. There is a high reliance on personal devices: some do ‘practice runs’ and many avoid specific modes, unfamiliar journeys or certain times of day to reduce anxiety.

2. Significant gaps in basic information provision

BPSP people rely heavily on audio and accessible visual information when using public transport. However, many feel that basic information is lacking; audio announcements can be suboptimal, and the placement and legibility of signage presents challenges.

3. Research creates community

One of the most rewarding moments as researchers was sitting back during the co-creation workshops and realising just how powerful research is for bringing those with lived experience together. Beyond generating solutions, the workshops became spaces for BPSP to share stories, tips and tricks for navigating public transport. For those without friends or family members with a visual impairment, the discussions reminded them that they are not alone.

Much of RNIB’s work involves engaging with organisations to offer support in making products and services more accessible – this can involve developing accessibility checklists. The charity used the insights to create a checklist of best practice and changes that could make journeys more inclusive. This research was launched in April 2023, and RNIB called for transport providers to work with the charity to create a transport infrastructure that works better

for everyone. RNIB’s business services team provides solutions to such challenges and works with transport hubs and travel providers to embed inclusive design into the customer journey.

It is important that RNIB identifies areas that are going to make the biggest difference for BPSP, and this research highlighted the importance of travel and transport. RNIB will be running test-and-learn cycles to build recommendations for what the perfect app-based solution could look like. It will also make recommendations on how training and support can be delivered to build confidence in technology among BPSP who don’t currently use it.

Most of us don’t think about how we use technology when we travel: we put our maps on when we hop in the car or walk to a new destination; we check the transport times on an app; and our sight means we don’t need anything to tell us at which stop to get off. But if you have sight loss, there are so many hurdles that make this a challenge; you need confidence – and need to be resilient.

This shouldn’t be the case – we have a real opportunity to change experiences for the better.

● **Harriet Bird is senior insight analyst at RNIB and Abigail Plank is research manager at 2CV**

Key quantitative findings

- More than half of participants (51%) said they found it difficult to navigate public transport facilities such as train stations, bus stations and bus stops
- More than a third of participants (35%) said they rarely or never use public transport; 41% of participants said they often use it and 24% said they sometimes use it
- More than three-quarters (77%) of participants said they felt nervous about travelling to unfamiliar places, compared with 18% who didn’t
- While most participants (71%) said they feel safe on public transport as a traveller with vision impairment, almost one in five (18%) does not.

Rising confidence

Marginalised groups are asserting themselves in Latin America, with diverse creative energy and an embrace of indigenous culture giving rise to vibrant brands and cultural scenes.

By Sabine Stork

“After 214 years we have a government of the people... a government of the callused hands... a government of the nobodies of Colombia.” So said Francia Márquez, who, a little over six months ago, became Colombia’s first black vice-president.

Márquez comes from Yolombó, a small village in the remote western state of Cauca. She trained as an agricultural technician, got a law degree, and became an environmental activist who organised a 350km march of 80 Afro-Colombian women to the capital, Bogotá, to protest against illegal mining.

Márquez could serve as a poster child for the rise of the marginalised across much of Latin America, which has been dominated by a male, white urban elite since the ‘conquest’ of the continent by European colonists. These groups – be they indigenous people, women, or inhabitants of far-flung regions such as the vice-president’s home state – are increasingly finding their voice.

A shift to the left in many countries and the election of a number of indígenas – such as Márquez and the former president of Bolivia Evo Morales – has led to more political representation and overt attempts to further inclusion, even if the results are yet to lead to measurable improvements in the lives of the underprivileged.

Newly confident communities and demographics are asserting themselves through soft power, and are becoming more and more influential in setting trends and

reshaping how Latin Americans see themselves. The immense creative energy of diverse, previously suppressed voices is giving rise to new businesses, along with a vibrant cultural scene.

Artesanos Don Bosco, based in the cool Barranco neighbourhood of Peru’s capital, Lima, sells highly contemporary furniture that incorporates Inca and Mesoamerican designs from Peruvian craftworkers using Amazon-sourced materials. The business is run as a charitable operation, with all profits going into educational and training programmes in the highlands.

Fashion designer Amelia Toro splits her time between her stores in Bogotá and New York. Her signature is the red embroidery she uses for white garments, which is influenced by indigenous Colombian needlework.

Mexican film has been particularly successful in making indigenous people more visible – from Oscar winner Yalitza Aparicio, who played the lead in *Roma*, a film told from the perspective of an indígena housemaid, to Tenoch Huerta, who plays the hero of *Black Panther: Wakanda Forever* and is an activist behind the Poder Prieto movement, which fights racism in the entertainment sector.

In fact, many Latin Americans are beginning to tap into latent indigenous wisdom for the benefit of consumers – and even the planet. On a macro level, Argentina’s Ministry of Agriculture, Livestock and Fisheries has created a National Directorate of Agroecology to promote traditional farming methods, such as organic pest control, the conservation of natural predators, and the development of biological corridors to create self-sustaining ecosystems.

In addition, spiritual tourism, including ayahuasca retreats, is on a steep growth curve, while there has been a re-evaluation of shamanism in Peru, Colombia and

Mexico. In the Colombian Amazon, local indigenous groups, supported by the World Wide Fund for Nature, are developing so-called impact ventures, which protect the natural environment and offer life benefits to communities. One such venture is the firm Bioingredientes Amazonicos in the border state of Putumayo, which has developed a sustainable use for two Amazonian fruits with nutraceutical properties – sacha inchi and cacay – in cosmetic skin products.

At the same time, making use of the huge diversity of local experiences and traditional practices can amount to a real challenge to the hegemony of white and US culture. As a result, young people are forging identities that are rooted in their own countries rather than aspiring to emigrate, or even travel.

This does not mean that Western culture does not still play a role. Latin Americans are mixing US cultural references into native folklore, giving birth to local fusions – both proudly asserting their own culture and challenging conservative expectations of women in their communities.

In the Bolivian city of Cochabamba, a group of young skateboarding women have formed ImillaSkate. They sport the usual white Vans trainers but pair them with *polleras* – voluminous, colourful skirts, traditionally worn by the Aymara and Quechua indigenous women. Wearing this attire, while also styling their hair in the traditional way, the skaters make strong statements of pride in their origins and promote further acceptance of their often-discriminated-against ethnic culture.

This confluence of ethnic inclusivity on the one hand, and female (and gender) emancipation on the other, is particularly striking on a continent strongly influenced by conservative values and subject to polarisations between progressive ideas and regression. In some countries, such as

- There are **160 million** people aged 15 to 29 in Latin America and the Caribbean (OHCHR)
- The largest populations of young people are in **Brazil, Mexico and Argentina** (Policy.org)
- The population of **15- to 29-year-olds** is the highest in the region’s history (UN)



The green scarf has been adopted by Latin American feminists and reproductive rights activists

“Many Latin Americans are beginning to tap into latent indigenous wisdom for the benefit of consumers – and even the planet”

Colombia, the economic contribution of women is encouraged through active state aid for female entrepreneurship. Argentina has seen years of reproductive rights activism known as the Marea Verde (Green Tide), which saw women take to the streets in protest wearing green scarves, culminating in the Argentine senate voting to decriminalise abortion in 2020. That movement has spread to other Latin American countries, with the Mexican Supreme Court ruling in 2021 that the penalisation of abortion is unconstitutional.

However, there has been a backlash. Argentinian-born and London-based Fernando Desouches, managing director of brand and cultural transformation agency New Macho at BBD Perfect Storm, says: “Despite a lot of progress in the years before

the pandemic, more recent figures show that men’s, especially young men’s, attitudes towards equality are regressing.” Given a backdrop of drug-related violence and widespread corruption in some of the countries, political progress still feels febrile.

Where does this hugely diverse and dynamic continent that seems so much in flux leave brands trying to market to its 650 million inhabitants, including 160 million young people?

Some are actively harnessing the vibrancy and wealth of diverse ideas that is being unleashed by disadvantaged groups. Local players such as Mexican clothing chain ¡Ay Güey! and Guatemalan liqueur brand Quetzalteca, big players such as Brazilian footwear brand Havaianas, and global companies such as Absolut Vodka are

using a colourful, maximalist aesthetic inspired by local cultures and the legacy of ancient American civilisations. Others are involved in brand activism, with PepsiCo supporting moves against gender violence, and others – such as Unilever, the owner of Dove – ensuring more diverse representation in advertising. Nike has launched a campaign Juntas Imparables (Together Unstoppable) promoting female empowerment.

However, other international brands are treading very carefully, uncertain how to use local codes without making mistakes, and nervous of falling foul of what may still be a conservative majority, irrespective of gender.

The potential gains for companies are huge, not only for campaigns that tap into the exciting wealth of Latin American culture, but also for developing businesses and new products that may help to make better use of our planet’s resources.

● **Sabine Stork is founding partner at Thinktank**

Telling the truth

David Olusoga has spent his working life shining a light on history to help us understand the world better. To challenge the stories we tell ourselves, he says, we must identify what is opinion, what is data, and look to the past for answers.

By Katie McQuater

When historian, broadcaster and writer David Olusoga gave his inaugural lecture as professor of public history at the University of Manchester in 2019, he described himself as a ‘connective circuit’ between the worlds of academia and public history.

It seems a fitting term for someone who has dedicated his career to bringing the stories of history to a wide audience, through television programmes including *Civilisations*; *Black and British: A Forgotten History*; *A House Through Time*; and the BAFTA-winning *Britain’s Forgotten Slave Owners*.

As we meet in a central London conference room, just before he takes to the stage for the closing keynote interview at the recent MRS annual conference, Insight Alchemy, Olusoga talks about how researchers can draw on emotive narratives effectively.

With the rise of generative artificial intelligence (AI) tools hitting the headlines, he thinks we would be ‘naïve’ not to look at the evolution of AI and algorithms and ‘not be nervous’, and points to the very human pursuit of storytelling.

“There’s something very deep within human psychology, which is the ability to tell stories. My job and my role very much is as a translator of information into story,” he says. “Connected circuitry translates information and data into story, and I’m constantly appealing to people who research areas I’m interested in to become better storytellers.”

Olusoga began his work in television – initially in research and later presenting – after studying the history of slavery at the University of Liverpool. He is also the author of five books, including *Black and British: A Forgotten History*, published in 2016.

“My career has fundamentally been about one thing: story,” he says. “If I were to define, in very basic terms, what I do, I’m a storyteller. I’ve spent my entire career working in radio, television, newspapers, publishing, and I think the thing that characterises most of the work I’ve done is an attempt to use story and the fact that we are naturally storytelling and story-receiving creatures to explore, and publicise, the issues and events I’m interested in.”

Storytelling is perhaps more challenging at a time of information overload. The rise of media fragmentation and social media platforms, coupled with smartphones, means that, by virtue of living in the modern world, we are bombarded with ‘content’ on a daily basis.

When I ask Olusoga what skills we need to better understand and navigate an uncertain world – one that many agree is experiencing a state of ‘permacrisis’ – he points first to understanding what is factual.

“Ten years ago, people would have said that the key skill was analysing information, and now I think the key skill is recognising what’s information and what’s opinion,” he says.

“We’re currently in an information climate unlike anything that’s existed before and it’s been really rapid, and it’s crept up on us in a way that nobody predicted.” Casting our minds back a decade

or so, Olusoga points to the ‘somewhat utopian belief’ during the Arab Spring of 2011 that new technologies would allow groups of citizens to overthrow dictators and threaten authoritarian forms of government.

“We ended that decade with a very strong belief by many analysts that those technologies of social media were not the great threat to forms of totalitarian and authoritarian rule, but they were the greatest asset that those forms of government had ever received, and that they were perhaps even incompatible with democracy.”

Olusoga believes we are living in a world in which we are ‘drowning in opinion’. In this context, the ability to recognise opinion, distinguishing it from fact, creates a new challenge, in addition to the need for analysis of data.

“It’s [about] actually accessing data, recognising what is data and what is opinion,” he says.

Distinguishing between the two is ‘simply a struggle’, he acknowledges, adding that much of what we’re talking about when we discuss media overload is opinion-based content, rather than factual information.

“Many of these channels, websites and publications predominantly publish opinion. It’s not that we aren’t drowning in information, it’s that the surfeit of information is a very small

amount of the overload of stimulus that we’re being fed, but the key task is going to be determining what is information and what is opinion.”

While that doesn’t remove the problem of vast amounts of information that is easier

than ever to access, Olusoga says: “Our fundamental crisis is that we have a social media and media ecosystem that has monetised opinion far more than it has monetised information and the distribution of information.

“Opinion is cheap; information gathering and knowledge production is expensive. That mismatch in the market is at the very root cause of what I think is a crisis.”

False debates

Today, producers of any information – or, indeed, anyone with any kind of public profile – can potentially find themselves attacked over cultural issues, whether they have entered the discussion willingly or otherwise. Outrage, whether genuine or manufactured, generates ‘eyeballs’ in a time of media fragmentation and publishers vying for attention.

Puffin, for example, was on the receiving end of ‘woke’ accusations after media reports on the book publisher’s plans to tweak Roald Dahl’s work for new editions, to remove terms deemed offensive. Even the National Trust was attacked by Conservative MPs and peers, and then right-wing commentators, when it published research examining its properties’ links with the slave trade and colonialism.

So, how can facts and accurate information win out in such an

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“Opinion is cheap; information gathering is expensive. That mismatch is at the very root cause of what I think is a crisis”
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“The algorithms and the social media platforms have computing power that just 10 years ago was almost beyond comprehension”
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incendiary context? When there is such a prevalence of opinion, and when opinion is what brings home the bacon in a splintered media ecosystem that relies on attention and outrage, how can information cut through?

Olusoga is of the view that the first step we need to take is realising that ‘culture wars’ are not, in fact, real.

“One of the challenges is not to play to the culture wars – to recognise that they are confected; that they are unreal and that they are designed to create electoral coalitions or climates of fear in which electoral outcomes are more likely,” he says.

“To enter into the culture wars is to accept the binary debate, to accept the terms on which those debates are drawn, and I don’t think we should.

“I think anybody who’s interested in verifiable fact and in generating metrics by which we might improve our societies needs to always, in those debates, repeatedly and constantly point out that the terms of these debates are false and invalid.”

As someone who writes and speaks prevalently about race, Olusoga has been on the receiving end of accusations that he himself is involved in ‘culture war’ issues. But, he says: “I’ve never engaged in those issues without making the point that these

debates are false, fake, illegitimate debates, almost always with a strategic electoral purpose behind them.”

What has been his personal experience of speaking out and writing about issues such as race and addressing our colonial history in quite a febrile time? “One of aggression, abuse, threats of violence – I’ve had to have bodyguards and I’ve discussed this with the police.”

He asserts, however, that this is “not a very unusual or interesting experience”. Instead, what he finds “really alarming” is not what people say, but “the confidence with which people have convinced themselves not just that they know what your views are, but that they understand the motivations that have led you to reach those views”.

That confidence is so watertight and extreme, says Olusoga, that it leads people to “demonstrably preposterous positions”.

He shares an example of a regular occurrence he experiences on social media – the suggestion that he wants to create racial tension.

“Every week, virtually every day, someone on social media or some other form of media will tell me that I hate white people, when I’m demonstrably and openly mixed race [Olusoga was born

to a Nigerian father and white British mother, and grew up in Gateshead]. They will suggest that I want to create tension between white people and black people, when my home is a mixture of white people and black people.”

The fact that such comments can be made – online and often anonymously – without consideration shows “a charge of false consciousness that is created by that environment and people that become trapped in it”, says Olusoga.

Despite experiencing online abuse, Olusoga doesn't blame the individuals themselves, but rather the system of misinformation and algorithms – one that inflates popular content with scant regard for accuracy and facilitates an environment for online trolling. He believes that those stuck in this ecosystem should be treated with the same sympathy and empathy as those addicted to substances or gambling.

“These are people who have lost rational cognition on certain issues, not because they're terrible people, but because they've been trapped in a system that is very sophisticatedly designed to work to the worst attributes of human nature,” he says.

“The algorithms and the social media platforms have computing power that just 10 years ago was almost beyond comprehension. They are exploiting and developing understandings of human psychology and human behaviour that are beyond anything [George] Orwell could have imagined, and we have our simple organic brains up against computing power far beyond our imagining.

“We need to recognise that the people who are trapped in this are up against a system of astonishing sophistication that has

weaponised the worst features of our nature and the way our minds and our cognition works.”

Olusoga wrote his first book – *The Kaiser's Holocaust*, about a German genocide in Namibia – with Casper Erichsen, after the two saw mass graves where bodies had risen to the surface and made a pact to tell the stories of the victims. But painful stories are not consigned to the past, and to understand attitudes and issues such as racism one must look into the history of how ideas are constructed, Olusoga believes.

During his keynote interview with Sinead Jefferies at the MRS conference, Olusoga discussed how ideas from the past continue to affect society today, pointing out that attitudes can't be fully understood without understanding their roots.

Referencing the European Social Survey, which, in 2019, found that 18% of British respondents agreed with the statement ‘some races or ethnic groups are born less intelligent than others’, he said: “It's equally important not just to worry about [the figure of] 18%, but also that these ideas are 300 years old and have had to transmit themselves like a virus – things you read in documents are not trapped in the 18th century.”

Olusoga argued that it is important to understand that attitudes, such as racist beliefs, have roots, because “we can't understand these things properly until we understand how old they are”.

Ideas were built and constructed, he continued during the conference session. “These ideas exist in the 21st century because of the fact they were put there. This was a system of belief that was invented and propagated by popular culture, not just ingrained beliefs.

“If we are going to fight these ideas, we need to understand how they were built. If you wanted to destroy a building, you would look at the blueprints to understand how it was built. The blueprints of these ideas lie in the historical documents.”

That black women are four times more likely to die in pregnancy or childbirth than white women – most recently confirmed in the MBRRACE report in November 2022 – is “one of the few facts that has cut through”, said Olusoga. He added: “Historians can never fully understand these ideas if we only understand how they operate now.”

During his session, Olusoga said he felt *Roots* had been the most important book in the history of slavery. While the novel is not a history book, but a “factually flawed” narrative of an individual and a family, Olusoga said: “It worked in the way that history books tend not to work. It worked through the personal, the individual, and through the comfort we feel with narrative.

“One of the great problems that many academics in many fields face is that we've turned our back on story. We think that analysis, debate and the application of theory to information is what is regarded as scholarship. That is quite a modern idea and I think it's quite a damaging one.”

Retreating to theory and analysis alone happened at “the worst possible time for academics to make themselves hard to understand”, said Olusoga, adding: “We need data and analysis, we need depth of thinking more than ever – this retreat from story has been deeply damaging.”



People power

People are the lifeblood of the research sector – its biggest strength and, in a world of AI, its genuine differentiator. But the industry is facing a challenge: how to not only recruit and retain talent – but help people flourish. Katie Jacobs reports

You're on mute." These seemingly innocuous words appeared more than four times as regularly in the transcripts of corporate earnings and shareholder calls in the second quarter of 2020 than the first, according to an analysis by Senteio published by Quartz. And that analysis doesn't even take into account the millions of calls that weren't officially logged. It could well have been the official phrase of working through the pandemic.

More than three years later, you probably still find yourself on calls uttering those three little words. Because if the pandemic upended everything about our lives, it is perhaps work that has been shifted most fundamentally and, potentially, permanently. How we work, where we work and what we feel about work have all changed.

It started with 'The Great Resignation', the term coined in 2021 by organisational behaviour professor Anthony Klotz to describe the trend of people leaving jobs in higher numbers thanks to pandemic-induced reassessments of life's priorities. Next in work-related buzzwords came 'quiet quitting', aka doing the bare minimum. Now, according to *Fortune* magazine, the latest trend to plague employers is 'resenteeism' – employees who hate their jobs but don't think they can find a better one. No wonder many employers find themselves struggling to keep up with a shifting labour market.

However, according to Barney Ely, a managing director at recruitment firm Hays, there is some good news for frazzled managers: The Great Resignation has 'certainly cooled', making hiring easier and shifting the balance of power back towards the employer. "Professionals who wanted to move did, so many of those are still in their first two years at a new organisation and the cost-of-living crisis has caused candidates to be more cautious in looking for a new role," he says. Although, he adds, that given permanent job vacancies remain significantly higher than pre-

pandemic levels, employers can't afford to be complacent when it comes to finding and keeping great people.

Every industry is feeling the pressure, but in market research and adjacent sectors it is particularly acute. Research by Hays finds that skills shortages in marketing are 'severe', with 93% of employers experiencing them in the past 12 months, rising to 94% in the technology sector. According to human resources body the CIPD's latest Labour Market Outlook, 51% of business services organisations (the category into which market research falls) report having hard-to-fill vacancies – although this has decreased significantly from 63% in the previous quarter. The business services sector is also the most likely of all industries to be experiencing skills-shortage vacancies, defined as vacancies that are hard to fill because applicants lack relevant technical skills.

"Since the pandemic, there has been a real shortage of skills and talent, particularly at mid-level," confirms Inger Christensen of market research recruitment firm Daughters of Sailors. While she sees things gradually improving, shortages persist, compounded in part by short-term decision-making around talent in some organisations, such as the cutting of graduate intake programmes in 2020/21. There is also a steady stream of people choosing to leave market research altogether, attracted by greater flexibility, higher salaries and a healthier work-life balance in other sectors.

It's a significant problem for an industry that Sinead Jefferies – senior vice-president of customer expertise at consumer insights platform Zappi and current chair of MRS – describes as being 'nothing without people'. "Increasingly, the value we offer is people who are

“Since the pandemic, there has been a real shortage of skills and talent, particularly at mid-level”

How to build a happy workplace

Matt Phelan is co-founder and co-chief executive at employee engagement company The Happiness Index .

When it comes to working from home ‘versus’ the office, our data makes it clear that there is a huge diversity in what employees want. Some want to work from home; others from the office. The one thing we all have in common is our desire for flexibility. Flexibility can cover work start times, location, the ability to flex your hours around childcare or significant life events. But don’t confuse the location of work with the need to provide flexibility.

All of your employees are adults. Leaders should be open in sharing their journey as a leadership team and the challenges they are facing. You will be surprised how empowering that can be for team members. Sharing the whole truth is key. It can sometimes feel uncomfortable, especially if news is perceived as negative, but it will help build trust over time. And trust is reciprocated.

From our dataset of 20m data points, we know that the top four drivers of employee happiness are: psychological safety; freedom to take opportunities; acknowledgement; and positive relationships. There is no downside to an organisation focusing on these areas. The best thing about them is you don’t need any additional budget – other than being an empathetic human being – to provide these for your people.

smart, who can think strategically,” she adds. “We need more leaders in the sector to engage with the importance of people and culture in facilitating what we do.”

In fact, not doing so could prove fatal for organisations: they simply won’t be able to attract the talent they need. According to Christensen, candidates are increasingly looking for a clear understanding of what a culture is like when they apply for roles. “We hear more and more from candidates that culture is really important,” she says. “They want a supportive working environment, somewhere you are listened to, where individual requirements are met, where you can influence things.” Employers, she adds, need to be able to tell a compelling



story about the purpose and values of the organisation, and how it supports staff wellbeing and development.

Opinium is one agency that appears to have cracked the candidate-attracting formula Christensen describes, growing successfully during the pandemic and subsequently. While associate director Kate Whiffen admits the talent pool has shrunk and negotiations for the best people have been notably tougher, she credits a progressive and inclusive culture with enabling the business to find – and keep – the people needed to support its growth. “Culture can be defined in many ways, but for us it’s about people, having that sense of belonging, trust, friendly environment and buzz,” she says. “We’ve worked really hard to keep this positive culture while transitioning from a small company to a much larger medium-sized agency.”

When it comes to the recruitment process, Whiffen notes that candidates appreciate good communications and quick decision-making, as well as a focus on inclusion. Opinium takes part in the 10,000 Black Interns initiative, a paid internship programme Whiffen encourages every agency to sign up to. It is also setting up an internship programme with the youth democratic engagement charity My Life My Say, helping 18-24 year-olds into work.

Another ‘small but powerful’ part of candidate attraction is bringing final-round interviewees into the office for their last interview, says Whiffen. “It’s not just a meeting room, but giving them a tour of the building so they can see the team in action and feel the inclusive collegiate culture,” she adds.

Creative flexibility

While Opinium embraces hybrid working, this in-person interviewing approach (and encouraging enough people into the office on certain days to create that vibe) is an

example of what Hays’ Ely describes as a return to ‘pre-pandemic habits’ for many organisations, in terms of face-to-face interviews and more time spent in the office during the first few months of a role. But flexibility remains a core part of what attracts people to a job, and crucially keeps them there; some 62% of employees would be tempted to change jobs if they could choose how often they were in the workplace, Ely says. It’s certainly something that Patrick Alcantara, strategic customer insight lead at AxA, has observed as he builds his team.

“Flexible working arrangements are increasingly part of the conversation when it comes to hiring,” he says, adding that AxA’s smart-working policy was part of what attracted him to the business: “It empowered me to create remote arrangements to work around my commitments, while maintaining purposeful, regular face-to-face interactions.” He is based in the North West, his boss in the South East, with other team members in Yorkshire and the West Country. “We maximise hybrid working arrangements to get work done while still getting the facetime crucial to team building,” Alcantara says. “Some colleagues choose to come into the office three or four times a week, while others have job sharing arrangements.”

While Alcantara has found the flexibility he desires, a lack of it on the agency side in particular is driving some people, most notably those with caring responsibilities, out of the industry entirely, says Christensen. While the pandemic has forced most organisations to offer a degree of home-working, there remains a need for businesses to think more creatively and strategically around the true meaning of flexibility, she says, whether

that be considering job shares, the four-day working week or part-time working, while appreciating that some roles are harder to do flexibly. And Ely warns: “If you’re not prepared to have an open dialogue about flexibility when it comes to different working patterns, professionals might look elsewhere for an employer that communicates more effectively.”

When it comes to hybrid working, Zappi’s Jefferies is clear that getting this new way of working right is ‘way more complicated than three days in the office, two days at home’. She adds: “You need to listen to people. It’s not ‘anything goes’, but about understanding your people, enabling them to work in a way that’s effective, in a highly supportive culture.”

At Zappi, staff are free to work from anywhere, but tend to go into their local office midweek to see colleagues and collaborate. Jefferies, who is an old-hand at remote working, having previously lived in France, is an advocate of asynchronous working, something Zappi is currently experimenting with different ways of using. She gives the example of a request for comment (RFC). Whereas before the process may have required numerous meetings, now the document is written up and shared with the team for feedback within a set timeframe. “It doesn’t matter if you do it at 6am or 11pm,” says Jefferies. “It’s a much more fluid way of working than having lots of meetings.” She adds that giving people this flexibility and autonomy over how, when and where they work is a boon for inclusion: “If you are open to people working in a way that works for them, it means that people who are neurodiverse or who have a disability can contribute more easily. It should be a massive opener for people’s contribution.”

Increased flexibility and open-mindedness about where people are located also opens up opportunities, as Alcantara has found, for people living outside of (often more expensive) cities. This has been the experience of Fiona Blades, president and chief experience officer at consultancy MESH Experience. Blades, who admits to being somewhat sceptical about how effectively you could manage people remotely pre-pandemic, has since wholeheartedly embraced the possibilities offered by location-agnostic working. The company went remote-first during the pandemic and has worked that way since.

“We can now recruit people in Wales, in Northern Ireland. My managing director is based in upstate New York,” she says. “It’s so expensive living in New York that lots of people have moved out, but we can still work with them. When I started the agency in London, it had more of an ad agency feel, with table football and a fridge full of beer. That has totally changed since the pandemic.”



Changing the script

The MRS People and Talent programme was established following research on retention and recruitment by MRS, Daughters of Sailors and Vela.

The qualitative research conducted for the report, published in 2022, found significant challenges for the sector to address.

First, the pandemic was found to have had a lasting impact. While there were benefits in taking a more flexible approach to work, for others, the combination of pandemic effects had negative consequences, such as the feeling that too many people had been furloughed and then retired or gone freelance – creating more strain for those still employed.

Second, the normalisation of long working hours in the sector was a consistent theme from the research, and particularly notable for people in supply-side roles. In addition, participants highlighted the expectation to be available whenever they are needed.

The report also underlined the impact of staff shortages and retention challenges on those in the sector, leading to more work being expected from those in both more junior and more senior positions. There was also a perception that salary levels in the industry are lower than those in other comparable professional sectors.

To address the recruitment challenge, the report identified:

- The need for more effective recruitment, from school leavers, apprentices and graduates to those making a career switch later on or those who have left research and want to return
- The need to change perceptions and expectations of the skills and experiences needed for a role. For example, some employers are moving away from traditional CVs to use cognitive testing and other approaches that focus on candidates’ potential and skills fits rather than meeting explicit criteria.

The People and Talent programme also includes workstreams focusing on wellbeing, learning and development, and agency culture and leadership.

To view outputs from the programme, and access resources on other topics such as best practice inclusion guides, visit mrs.org.uk

Building connection

Despite ditching the table football and the beer, the business still finds creative ways to engender camaraderie, both in-person and virtually.

It runs an internal awards scheme, for example, and a festival every August, with three weeks of learning (through online sessions), socialising (with parties in New York and London) and volunteering.

“We’ve been deliberate about creating face-to-face quality time,” says Blades. “I prefer that to walking into an office and seeing everyone with their headphones in.”

Additionally, every other week, a name is drawn out of a hat and that person gets that Friday off. “It’s those little things that are helpful in defining the culture,” she says.

If people are coming together less regularly in-person, creating inclusive opportunities for engagement online is critical for a positive, thriving culture that catalyses great work. Jefferies advises using technology not only to enhance productivity or get work done, but to keep people connected socially.

“We have a massive Slack culture, with threads for pets at Zappi, kids at Zappi, random chat,” she says. “The way you use tools can be massively powerful in keeping people engaged when not in the office.” Every Friday, Zappi staff can join an all-company call, hosted by the chief executive, where anyone can present on a topic of their choice (one of Jefferies’ team, based in Michigan, recently shared his passion for fishing). “You feel like you’re part of something. That connection and engagement is active and alive, wherever in the world you are sitting,” Jefferies adds.

Zappi’s Slack deployment is a great example of technology being used for good, but it cannot be ignored that digital overload can lead to burnout. A recent report on recruitment and retention in the research and insight sector, published by MRS, Daughters of Sailors and Vela (Jefferies’ previous consultancy) in June last year, cited ‘a perceived culture of excessive working hours and unreasonable demands on staff’ as a key cause of talent shortages, with overwork and its impact on personal wellbeing driving some to leave the sector or to go freelance in a quest for more flexibility and a better balance. “[In agencies], there is a tendency to take on more work than there is resource, as well as the tendency to not want to say anything but ‘yes’ to clients,” says Christensen. Jefferies adds that until the potential of AI is realised, the volume of manual tasks can mean the more interesting parts of roles are forced to the fringes of the working day.

This is something Opinium has recognised and taken strategic steps to tackle, says Whiffen. “When we were a small agency, all researchers did everything, including questionnaire design, scripting and data processing. But as we got bigger, the volume of data processing got huge,” she explains. To ensure people could focus on

‘being research consultants first and foremost’, Opinium opened an office in Cape Town to deal with data processing. “Now we have a brilliant team of data processors who are focused on building their careers around data and analytics, and everyone is able to play to their strengths,” says Whiffen.

Working well

Putting wellbeing at the centre is another way of helping people deal with the stresses and challenges that come with any job, as well as helping businesses attract and retain talent. This could include giving employees money each month to spend on their wellbeing or personal development, or offering access to specialist mental health support services.

“There is more need and desire to have a greater work-life balance and better personal wellbeing so offers of mental health support and stress reduction are becoming higher on people’s wish lists,” says Opinium’s Whiffen.

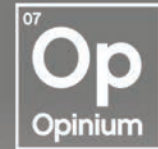
Alongside practical support around mental and physical health, employers also need to consider ways of working and leadership behaviour. All the fruit baskets and yoga classes in the world aren’t going to help if someone’s job is simply too big or if a manager is behaving badly. “Ways of working help to support wellbeing,” says AXA’s Alcantara. “We actively encourage colleagues to take their annual leave and relax, not answering emails or calls on holiday. As leaders, we try to model positive behaviour the best way we can, taking breaks ourselves, offering flexibility where needed and checking in regularly as a team.”

There is another form of wellbeing businesses need to address, one that is more at risk than ever in today’s cost-of-living crisis: financial wellbeing. CIPD research has shown that when employees experience financial distress, their wellbeing and job performance suffer, with 29% of people saying cost-of-living-related financial worries have negatively impacted their productivity at work. The average pay award across the private sector stands at 5%, with many organisations introducing more regular pay reviews (every six months rather than annually for instance), or giving one-off cost-of-living payments to staff on lower salary bands.

Paying fairly is critical, but there are other ways to compete when constrained on salaries and unable to keep up with inflation, rather than getting into a bidding war. Benefits, both tangible (such as private medical insurance or access to money-saving deals) and intangible (like flexible working and learning and development), can help firms find and keep the people they need. According to Ely from Hays, 56% of professionals would be prepared to accept a lower salary for a better work-life balance. Allowing people to work remotely and flexibly (starting after peak travel time for



“There is more need and desire to have a greater work-life balance and better personal wellbeing”



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example) can help cut personal travel costs.

But perhaps the most powerful attraction and retention tool is something you can't put a price tag on: purpose. Most candidates (85%) consider an organisation's sense of purpose to be

important when considering a new role (Hays again). It's something Blades recognises as becoming ever more important. "Younger people are coming into the workforce and they are keen to make sure they are doing some good. We need to listen to that," she says. She adds that creating alignment between an individual's sense of purpose and the business values can aid retention and engagement.

It's all about giving staff the 'experiences that help them to grow as people', she adds, such as empowering people to launch internal sustainability initiatives.

Alcantara acknowledges that for busy managers, delivering all of this can feel like a big ask: "Building a positive workplace culture can be tough; we often have a hundred other things to worry about." But, he notes, insight and research professionals should be encouraged by the fact they have something of a head start: "Our roles include keeping our stakeholders honest, using data and insight to create a compelling case for change. It's about setting a good example and using the tools at our disposal to encourage positive behaviours."

As Jefferies passionately points out, all this will soon be, if it isn't already, a non-negotiable for any market research leaders wanting their teams to deliver great work. "We need our people to flourish and thrive, not be burned out," she concludes. "Helping people to work at their best will become an absolute hygiene factor."

Forget robots – research is, and always has been, a people business

The research and insights sector is in the grip of a mild panic. If you pay attention to your LinkedIn feeds, you might be convinced we are about to lose our jobs to the robot hordes or, depending on your perspective, more positively, we are about to have more free time as AI does the heavy lifting.

While generative AI is indeed a game changer – and we at Opinium are harnessing it to great effect – I do think that the panic element, while understandable, is misplaced. It is also distracting from a very real issue – that of the talent shortage in our industry.

'The Great Resignation' is expected to peak in 2023, but the reality for many growing agencies and client-side insights teams is that it is desperately hard to fill the positions we currently have, especially those hell-bent on driving towards a more equitable and diverse workforce. Robots might be the talk of the town, but research is, and always has been, a people business.

As a sector, we desperately need to retain existing talent that we have, attract back those who have left, recruit new talent from outside the industry and make market research and insight a destination-career choice for school and university leavers.

The people who we attract into the industry via any of these routes must come from a wide and diverse range of backgrounds. Not only does spreading our net wider mean we have a greater pool of talent in which to fish, as it were, but also, there is a body of evidence that shows that diverse teams are just better – more creative, inspiring, and effective. Not to mention, in our case, better at understanding the diverse populations we draw insights from, every day.

We must stop recruiting from just a handful of the 'best' universities and make opportunities open via apprenticeships and entry-level roles, and for people of all ethnicities, from all geographies and of all classes. We

must recruit talented people from other sectors – media, entertainment, the arts, finance, for example. We must make our workplaces viable for returning parents and deal with the age discrimination that causes people to leave or retire too early. We must showcase our industry at university and school career fairs.

Our experience at Opinium, and my firm belief, is that culture is the difference between success and failure, not just in recruitment and retention, but in everything we do.

Our emphasis is on empathetic leadership, with a sustained focus on boosting mental health and wellbeing and engendering a sense of team spirit, where everyone has a voice and is recognised.

I call on industry leaders to truly invest in the future. Put your culture and people first and worry about the robots a distant second.

● **James Endersby**, chief executive, Opinium and chair designate, MRS



We are Opinium.
We are what people think, feel and do.



Talking about my generation

Channel 4 is on a mission to engage young people across its platforms, and it wants to use evidence to make sure its content, programming and brand stay relevant to a generation that is increasingly misunderstood. Katie McQuater speaks to the broadcaster's James Hamilton, and Craft's Konrad Collao, to find out more about its Generation Z-focused research study

Young people are all 'woke'. Depending on what you hear and read, they are all angry activists or wannabe TikTok influencers. Of all the cohorts, the younger generations seem to get the shortest shrift in terms of stereotypes and lazy generalisations. Despite its size – comprising around eight million Britons – Generation Z is often portrayed as a homogeneous mass.

As a public service broadcaster, Channel 4's brand is heavily shaped by its remit to champion unheard voices, innovate and stand up for diversity. The channel's existence is dependent on its relationship with younger people – so it

needs to understand them and try to get in front of some of the misconceptions about them, in order to take a nuanced approach to its Gen Z audience and compete with multiple other demands on their attention.

"We have a remit to speak to and represent all of Britain, but with a specific focus on understanding younger people. You can't do that without talking to them and seeking to understand them," says James Hamilton, who leads the audience planning function at Channel 4.

In what was "probably the biggest piece of research" carried out since Hamilton joined Channel 4 a decade ago, the broadcaster spent almost 12 months

working with research partner Craft on a mixed-method study, as it looked to delve into the world of young people and understand more about their motivations, aspirations, fears and challenges.

“This research crucially wanted to hear from young people themselves: to walk in their shoes and find out what it means to be a young person in Britain today,” says Hamilton.

“As an aside, I’m constantly bombarded with a steady stream of often spurious, sometimes really poor, research that presents Gen Z as being either saints, sinners or victims, and I’ve always looked to bring more nuance to the conversation around young people.”

The extent of that lack of nuance in assumptions about young people was one of the more surprising themes to emerge from the ‘Beyond Z’ research, adds Hamilton. “The surprise was how poorly the picture is painted of young people today. They’re not all in conflict with older generations – there’s far more that unites us as people than divides us along generational lines.”

Channel 4 chief executive Alex Mahon went one step further in her assessment. In a speech about the research findings in November 2022, she said: “Having studied the results, I’m asking myself: is this the most misjudged group of people in our recent history?”

Quantifying trends

Hamilton commissioned and ran the Beyond Z project with Georgina Harvey, who works on the commercial side of the research team at Channel 4, and the project had a range of stakeholders from across commissioning, marketing, brand and commercial.

“From a stakeholder perspective, it was something that touched on pretty much every aspect of the business, so we canvassed as many key stakeholders as possible to make sure we were answering the questions that were keeping people up at night,” says Hamilton.

With a broad brief, the project began with desk research and key expert interviews that fed into a phase one quant stage. Initial quant findings were

“Having studied the results, I’m asking myself: is this the most misjudged group of people in our recent history?”

shared internally and that helped to shape the qualitative stage, with ethnography, depth interviews and filming taking place. Then Craft carried out a second stage of quant. At that point, a lot of unexpected insights had emerged from the qual – particularly around social media consumption and its effect on body image – and Channel 4 wanted to find out more.

“We wanted to quantify and to establish whether these really were trends that were affecting large numbers of young people, not just part of our sample,” explains Hamilton.

Craft founder Konrad Collao adds: “We really wanted to go back and validate or disprove our hypothesis. We had these hunches that were borne out in the quant really strongly.”

One such finding, and one of the main insights picked up in mainstream press coverage of the research, was an emerging norm of young people being simultaneously illiberal and progressive – prompting Channel 4 to coin the term ‘young illiberal progressives’.

While significantly more liberal on some issues, the research also found that a quarter of Gen Z say they “have very little tolerance for people with beliefs that they disagree with”, while almost half agreed that “some people deserve to be cancelled”.

Additionally, while social media is often viewed – among older generations – as a source of mental health anguish for young people, this research found that socioeconomic issues – such as cost of living and lack of affordable housing – had a bigger negative impact on their mental health. However, one in five reported that they have paused their social media use to protect their mental health and one in nine have given it up permanently.

“It’s a classic generational battleground; older generations are using [social media] as a lightning rod for arguments with younger generations about behaviour that simply didn’t exist for them. It behoves us to understand that behaviour, rather than crudely label it or castigate it,” says Hamilton.

Having a relatively open brief from the client, says Collao, was “quite helpful” from a recruitment perspective. “The subject was life, the universe and everything else. We just needed them to be who they were. We essentially just had a demographic.”

In addition to the mainstream sample, the researchers worked with around 10 “cutting-edge participants” that were cast rather than sampled, and these included a TikTok creator, a trans rights activist, a climate change activist, an e-sports specialist, and even a cassette collector.



Collao explains that this was because the researchers recognised interesting things happen at the fringes of culture – and “some of it may influence what happens in future and some might not; it might just be total outliers”.

Working with a broad brief was “lovely”, adds Collao: “Doing these broad pieces is really stimulating intellectually – but it is a challenge to try to fit it all in.”

Craft had the challenge of balancing the need to be exploratory and the need to be more focused with the qualitative research, so it split its budget – of time, questions and activities – into two chunks. One was open and exploratory, asking participants to film a day in their work or school life, or a typical day with family and friends, for example. There were also thematic tasks, where researchers asked more purposive questions around specific issues.

A vast dataset also presented another significant technical and analytical challenge – the self-shot video ethnography generated 43 hours of footage that the researchers had to not only deal with on a practical level, but also make sense of.

While offering a treasure trove of insight, a dataset of that size required some thought to ensure individuals working on it weren’t overwhelmed, and

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“The research highlighted that young people don’t see themselves as separate from society”
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to work out how to go about understanding endless reams of footage. “Nobody can sit there and watch 43 hours of video and make sense of it,” says Collao.

The team devised processes to share the workload, including sticking to a structured analytical framework. “It was good that we had time to do this – there was a lot of data and it was so vast, topically, that it required a lot of cognitive effort and time to breathe, to be able to start to boil it down,” Collao explains.

With the research touching on topics such as mental health and body image, there was also an emotional element to the management of the vast amount of footage gathered.

“Over time, you form bonds with these participants, and they form bonds with you,” says Collao. “Those bonds allowed us to respectfully, with their permission and collaboration, show these young people in all their depth.”

At the end of 2022, Channel 4 launched a current affairs strand, *Untold*, aimed at 16 to 34-year-olds. Launched primarily with a digital-first approach for All4, but also with linear slots, the strand focuses on producing *Dispatches*-style documentaries aimed at younger viewers. Its programming has included an exploration of the secret lives of incels (young men describing themselves as ‘involuntarily celibate’), an investigation of UK gang violence, and a film about what happens to *Love Island* contestants after the show ends.

Telling relevant stories

The ‘Beyond Z’ research has helped to shape the development of *Untold* and inform its ongoing strategy.

Channel 4’s Hamilton says: “We’ve always wanted to make sure that our independent broadcasting, in general, is doing everything it can to allow young people the right kind of access to the content that matters to them and matters to the society they are part of.”

The research highlighted that young people “don’t see themselves as separate from society; they very much see themselves as part of society”.

With that in mind, Hamilton says: “This research is shaping that continuous strategy to make sure that we remain a



Channel 4’s digital-first youth-focused channel, 4.0, includes the cooking series *Secret Sauce*, fronted by YouTuber Chunkz

relevant and resonant brand, and are telling as relevant stories as possible to those audiences.”

Findings from the work are also being used to inform the tone and ongoing editorial strategy of Channel 4.0, the broadcaster’s youth-focused YouTube channel.

The research – presented in a 30-page report and launched at an industry event (pictured) that included panel discussions with young people – has also been shared with commercial partners and advertisers, who are making use of the findings and highlighting Channel 4’s credentials as a media brand with nuanced understanding of young people.

As the research had such a broad outlook, the broadcaster is also using the project as a starting point to delve into other areas, explains Hamilton.

“The research is a great springboard for shaping other, probably more content-focused research or brand and marketing research that we’ll be doing with younger audiences over the next few years,” he says.

“It presents a whole lot of questions, not least because it’s probably atypical of the kind of audience research that we would normally do, in that it wasn’t content-focused and it wasn’t a piece of media research. While we spoke to young people about their relationship with media brands and Channel 4, it didn’t talk to them massively about what they watch.”

The finding that while young people might be liberal in their perspective on human rights, but be libertarian from an economic perspective – and not classically left wing as the media often portrays them – also poses questions for Channel 4.

“That obviously has implications for how we talk to them as a brand and how we address their interests specifically in our content,” says Hamilton.

“Our brand line is that Channel 4 is altogether different – their perspective on difference is very different from a middle-aged person’s perspective of difference.”



Methodology

The Beyond Z research combined: background and desk research; interviews with youth specialists; two nationally representative quantitative research studies among 1,500 people in cohorts of 13 to 24-year-olds and over-25s; and ethnographic and qualitative research among a sample of 37 young Britons from across Britain and Northern Ireland.

Researchers from Craft analysed data using synthetic cohort analysis – an approach that seeks to establish the interplay between:

- Life-stage effects – where change occurs in predictable ways as people age
- Period effects – consistent changes in attitudes, beliefs and behaviours of a society across different demographic groups, often in response to major events
- Cohort effects, where an age group does have different attitudes and behaviours from other groups.

Finding gems

Diamonds are arguably the ultimate luxury status symbol – but, in a changing world, insight is helping De Beers understand how consumer trends are shifting.

By Liam Kay-McClean

In 1948, one of the most famous advertising campaigns of all time proclaimed that 'A diamond is forever'. The slogan, written by Frances Gerety at advertising agency NW Ayer, created the modern concept of the engagement ring and cemented the diamond as arguably the world's ultimate luxury consumer good. The stone has since become a byword for beauty and a centrepiece for special occasions, such as engagements and weddings. It has also seeped into popular culture, with references ranging from Marilyn Monroe singing the slyly satirical *Diamonds are a girl's best friend*, via James Bond and *Diamonds are forever*, through to

Rihanna's bombastic *Diamonds*. The creator of the original 1948 campaign, De Beers, has maintained its central position in the diamond industry in the decades since. Its work spans the entire jewellery production process, from mining to cutting, as well as the sale of everything from rough diamonds to consumer-friendly jewellery.

Founded in 1888 in South Africa and headquartered in London, De Beers is 85% owned by mining company Anglo American and 15% by the government of Botswana. It has 20,000 employees working in 28 countries, including mining operations in Botswana, Canada, South Africa and Namibia.

The diamond industry has been somewhat controversial over the years, from the 'blood diamonds' scandals of the 1990s, with diamonds bought from conflict-hit areas of Africa, and concerns over the environmental impact of mining. De Beers has



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“Consumers want to understand whether what they buy is doing good in the world”
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provided ethically sourced and conflict-free diamonds since 2000, with certificates of authenticity and microscopic branding used to show diamonds have met the firm’s environmental and ethical criteria.

With sustainability an increasingly prominent part of the consumer psyche, especially among younger generations, there are challenges for a firm involved in mining.

Insight is key to informing the company’s strategy. “De Beers’ leadership has always valued insight generation and, over the years, has invested in it in a big way,” says Diana Mitkov, senior manager of demand insights and strategy analytics at the company. “It is used in the day-to-day business management and planning, and, of course, in setting strategic direction.”

Precious information

Mitkov works in the strategy development team for the De Beers Group, specifically within the strategic insight and analytics function. The strategy development team, consisting of 12 people, is responsible for areas including: business planning, such as long-term forecasting; competitive intelligence and insights; foresight; and strategic choices, involving analysing the diamond market to help provide choices about where the company should go, what it should do, and how it should evolve.

The team focuses on understanding the demand for diamonds globally, both from a consumer and business-to-business perspective, as well as broader trends in jewellery and luxury goods.

The three largest diamond markets – the US, China and India – are at the centre of De Beers’ research focus. Large-scale consumer surveys, carried out by Ipsos, interview 20,000 people in the US and 10,000 in China on a regular



basis to allow De Beers to examine changes and patterns in the diamond industry and beyond.

Two changes in the diamond market over the past decade or two have led to strategic changes at De Beers, informed by the work of the insights department. The first is the growth in popularity of pre-owned diamonds, driven by changes in fashion, as well as more sustainable behaviours, which informed De Beers’ decision to get involved in the market.

Increasingly, people are trading in diamond jewellery to purchase something more in-keeping with current fashions, explains Mitkov – particularly younger generations inheriting jewellery. “We had identified this trend and, over the years, various pieces of research were done in that space to see what is going on and driving people to sell their diamond jewellery back to the trade,” says Mitkov. “De Beers decided to pilot a pre-owned diamonds venture and, gradually, this is evolving and transforming into a more complex circularity strategy that will help meet our ‘building forever’ goals.”

This ‘building forever’ strategy looks to support environmental, social and governance issues at the company. It includes partnering with communities where diamonds are mined and making

sure they benefit from diamond mining, as well as strengthening the firm’s ethical practices and protection for the natural world.

“Insight and really understanding people’s thinking around what they do with diamonds they own – how they dispose of them – led to these further developments in strategy formulation for the business,” Mitkov adds.

Consumer awareness of sustainability in recent years and technological developments have driven growth in the lab-grown diamonds market, which is now estimated to be worth more than \$22bn and equivalent to 7% of loose diamond sales. Legacy players are also investing in the area.

Over 20 years or so, De Beers has been developing its lab-grown diamonds offer, using a threshold framework to test when it might be ready for the company to enter the market and carve out a niche for the product in the diamond industry.

In 2021, that work culminated in launching its own lab-grown diamond brand, Lightbox. However, it took a different approach to the positioning and marketing compared with natural gems.

Lightbox will be the only jewellery brand to source lab-grown diamonds from De Beers Group’s Element Six business, which produces lab-grown



diamonds. Any Lightbox lab-grown diamond of 0.2 carats or above will have a Lightbox logo inside the stone.

“We wanted to position lab-grown diamonds in a different space to natural diamonds,” Mitkov explains. “We didn’t want them to be competing head-on – we wanted them to be complementary categories and to be different categories people could turn to for different reasons and occasions and motivations. Lab-grown was intended to be a much more accessible and affordable product that can be fun and can be acquired any day for any activity. We wanted to preserve the space of special occasions for natural diamonds.”

The insight team carried out a wide range of research on lab-grown diamonds – from modelling the potential share of the market that could go to lab-grown and carrying out qual to capture people’s feelings about the area. “Very few people understood what it was, so it was quite interesting to see what they perceived and what they thought would happen with this new product,”

● **Future-proofing an iconic product, such as a diamond ring, is an important job** ●

says Mitkov. The findings were that lab-grown is seen as a fun product you can enjoy and not worry about – an accessory – while natural diamonds remained the top choice for life events and special gifts.

Diamond provenance and origin traceability is a big issue that has recently resurfaced with the war in Ukraine, with Russia being one of the world’s biggest diamond producers. To help address concerns about the origin of diamonds, De Beers has produced a traceability tool to trace a diamond from its rough state to the jewellery consumer’s buy. The platform uses blockchain to allow diamond owners to access a record of a diamond’s provenance and track its movement through the diamond market.

Users of the platform can also choose who can access their information.

“If you are able to tell that richer story of diamonds, it is much more positive for consumers and makes more sense for retailers as well,” Mitkov states. “Because consumers are interested, they want to understand whether what they buy is doing good in the world. Because it is a luxury purchase, that is even more so.”

Not set in stone

Information gathered from research projects is shared internally via an insight portal, covering market intelligence and pulling in information from a variety of sources. These include third-party insights and analyses and internal research projects, as well as external fortnightly data on sales presented on interactive dashboards that allow users to interrogate the data.

“Anyone who wants to know what the situation is in the retail space, and what retailers in the US are selling at the moment, can see how things are evolving,” Mitkov explains. “There is a lot

of information that needs to be absorbed, and there is a lot of pull for that information. It is not as if we need to push that information to the business – people understand the value of it and are hungry to get it.”

While the bulk of the company’s insight work is at a group level, De Beers has small insight teams within its three main brands – De Beers Jewellers, De Beers Forevermark, and Libert’Aime by De Beers Forevermark – which interact with the group’s main insight department. Often, the brand-specific teams have a narrower focus on brand strategy and products, including new collections and positioning.

There is a shift towards data analytics, and interest in the potential impact of artificial intelligence (AI) on the insights function. “From an insights perspective, digitisation and data analytics has become something of a great priority,” explains Mitkov. “We have been working on this, but the urgency is growing and I see the pace of adoption of technologies such as AI has grown phenomenally.”

Most of all, Mitkov is keen to work with research agencies as partners, helping them to truly understand the business. “I try to bring them on board as much as possible to explain to them what we are all about and trying to do, and to be very open – to bring them into the business – so they know the questions I am trying to answer and the challenges I am trying to resolve,” she says. “That’s the only way they can feel they are a partner to me, and that I can get the most out of the work they do.

“I am an advocate for an open and close relationship with agencies, where you have full transparency over what you want to achieve. That is a valuable feature of any productive relationship, where you can enable your research suppliers to become your consultants and partners.”

Hunting for gems

They might be luxury goods, but the natural diamond industry still has its challenges, notwithstanding the current macroeconomic climate. The company’s 2022 *Diamond Insight Report* found that, despite worldwide economic difficulties,

diamond sales were up 27% globally in 2021, and up 32% in China and 36% in the US. In other parts of the world, there were greater challenges, with Japan, for example, seeing a 7% drop in 2021.

In the report, the company examined how Gen Z and changes in the digital world – such as the metaverse, augmented and virtual reality, and AI – as well as sustainability and ethical consumer behaviour, were altering the diamond market. The digital world was also a large focus of the report, with Gen Z in China, for example, increasingly using social media to research products to buy, compared with apps and websites for millennials.

The report deemed the metaverse to hold potential for ‘digital twins’ to be created of people’s jewellery to guard against losing an expensive piece of jewellery or having it stolen.

Several sources of information fed into the report, including a piece of primary research with GlobeScan to understand engagement among consumers with environment, social and governance issues, and how many people actually opt for responsibly sourced or sustainably produced items. The research found that jewellery was

the third-biggest area for sustainable shopping, after food and clothing, and that 58% of consumers wanted sustainable jewellery over non-sustainable. Of that 58%, 92% said they were happy to pay more for ethical jewellery.

For another insight report, De Beers worked with DiscoverAI to examine the role of diamond rings in the ‘commitment space’, looking at the concept of commitment in all types of relationship, including family. The research used web scraping to understand the key themes in relationships, which helped inform a questionnaire presented in a Tinder-esque ‘swipe’ format and developed by DiscoverAI. Users could choose which of the themes they felt applied to them, and the research found that diamonds were often connected with ideas such as self-expression, the ability to show connection, and have fun.

Future-proofing an iconic product such as a diamond ring is an important job, and one that the insights function at De Beers has embraced.

The company hopes that its 1948 claim that diamonds are forever does indeed ring true. Insight will be helping to light the way.



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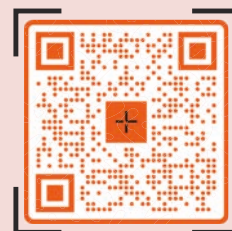
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State of the nation



It started on 30 January 2020, when the World Health Organization (WHO) declared Covid-19 a public health emergency of international concern and by 11 March 2020 characterised the outbreak as a global pandemic.

What an unimaginable impact this has had on the world.

When the WHO declared the end of Covid-19 as a global health emergency on 5 May 2023 – after seven million lives had been lost and 13.3bn vaccine doses had been administered worldwide – the macroeconomic and geopolitical landscape had been redrawn.

As is well documented, central banks – in response to the lockdowns imposed by governments worldwide – reduced interest rates to near zero and continued quantitative easing for a prolonged period, which led to uncontrolled economic expansion with accompanying high inflation. The fastest interest-rate hikes in history ensued, with 10 consecutive rises in the US and 12 in the UK. To the surprise of many, there followed the inevitable credit crunch and attendant blow-ups, from the liability-driven investments crisis in the UK last autumn to the demise of four US regional banks.

The FAANGs’ – Facebook (now Meta), Apple, Amazon, Netflix and Google (now Alphabet) – omnipotence during lockdowns, with the world working, shopping, home schooling and entertaining itself online, has given way to retrenchment and redundancies. The FAANGs have gone from being massive Covid beneficiaries to victims, as the end of the pandemic has unleashed pent-up demand for experiential consumption across the wider real economy.

Additionally, the concentration risk of the FAANGs – Amazon in retail, Google in advertising, Meta in social media and Apple in luxury goods – has led to swathes of lay-offs, with Meta and Amazon recently embarking on their second rounds in order to recalibrate their business models in line with slower consumer demand.

This retrenchment by companies to mitigate headcount issues after inflating their organisations during the pandemic boom should not come as a big surprise. The post-pandemic cost-of-

living crisis has impacted on life’s basic essentials – food, heat and shelter – with food inflation running at an unprecedented 19.2% in March, energy prices exacerbated by the invasion of Ukraine, and mortgage rates and rents rising as a result of higher bank rates. Consequently, the average consumer is focused on ‘need to have’ rather than ‘nice to have’ expenditure, and the economy is flatlining. To counteract this, companies such as Octopus Energy are experimenting with artificial intelligence (AI) to reply to a third of customer emails – the work of around 250 people.

The rapid advance in AI represents a pivotal moment in the history of mankind. The last industrial revolution was a revolution of the muscle; this is a revolution of the mind. As we grapple to understand the true benefits and inherent risks,

where does the future lie? Is AI the answer to our problems and the solution to existential threats such as climate change – or is it an existential threat in itself? Are we standing on the edge of the abyss, heading towards a point of no return?

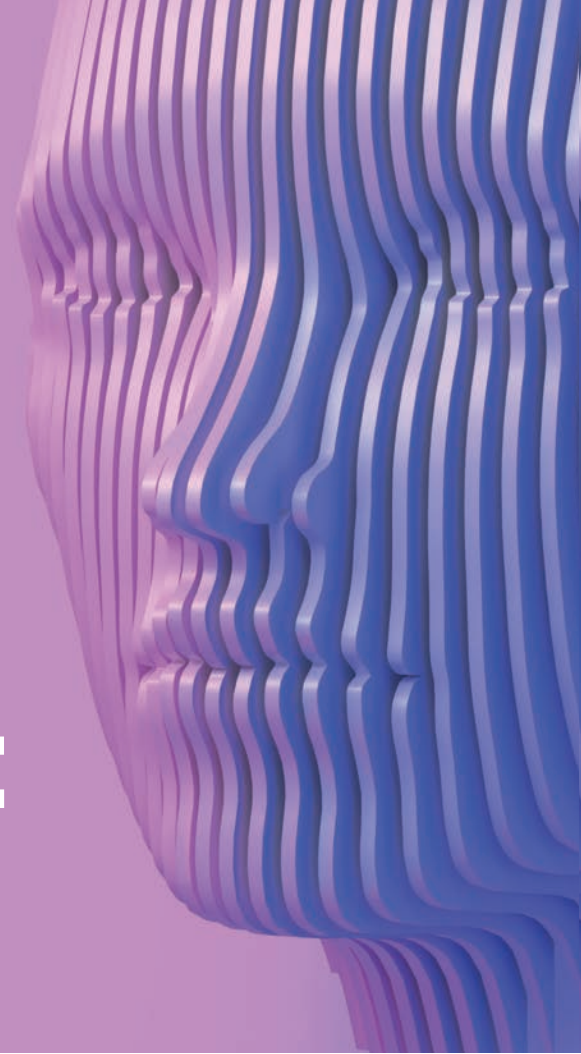
Another day, another existential threat. The content and conjecture regarding the likely course of AI and

artificial general intelligence has exploded. If there’s one thing the modern mind was not created to be able to cope with, it’s the relentless barrage of signs pointing to its own annihilation.

With governments and regulators alike failing to regulate the internet at its inception, let us hope they react in time with AI and do not let the drive for ‘growth’ and ‘innovation’ override the wider existential concerns. For the first time in history, humankind has created something that can control and destroy it. Those who can do something to put in guardrails, must. If not... well, there’s not much the lowly people can do at this point, unless we excise all use of tech from our lives, which most of us are unlikely to do.

It will be interesting to see whether hope appears in the form of government-level regulatory action, even newer (and therefore, under-tested) competing tech, grassroots collective resistance, or a crisis-prompted return to a more primitive world. Only time will tell – and it’s not on our side.

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“If there’s one thing the modern mind was not created to be able to cope with, it’s the relentless barrage of signs pointing to its own annihilation”
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Virtual engagement

Generative artificial intelligence can boost survey engagement, research commissioned by beer maker Heineken and carried out by MMR Research has found. Liam Kay-McClean reports

The metaverse. ChatGPT. OpenAI. Chatbots. Apple Glasses. Google Bard. Much has been written in recent months about the potential transformative impact of artificial intelligence (AI) and augmented reality (AR) on the market research industry and wider society. It has become increasingly hard to separate the wheat from the chaff when it comes to opinions on the subject, with little evidence as to what the likely role either technology will play in our daily lives and in the workplace.

Heineken wanted to see what impact technologies such as AI had on engagement with consumers. To try to address the evidence gap, MMR Research and Heineken set up an experiment to see how AI technologies affected market research surveys and whether they could enhance the reach of market research, especially with a younger audience. The study followed an MMR Research-funded experiment on AR's impact on survey engagement.

With much of the industry's experimentation in AI and AR currently focusing on qualitative research, the researchers chose to conduct the study using quantitative methods. The researchers intended to see whether the two technologies could help address

some of the myriad problems facing quantitative research, such as engagement, survey fraud and data-quality issues, according to Alexandra Kuzmina, innovation consultant at MMR Research, who led the research.

"Can technology help us prevent that data-quality disaster? We hypothesised that it can, and that it can also uncover better quality insights if people are more engaged," Kuzmina says.

MMR Research conducted two experiments with consumers – one using an AR hologram and another using an AI avatar.

The first experiment, run through an AR app, tested three different features using the same survey, the first being an AR hologram of a researcher explaining the assignment that played before the survey, with users directed to the survey after the hologram ended. The other two elements tested a video of a human researcher introducing the survey and thanking participants, while the third was a control group using a standard survey with a written introduction.

Participants were provided with an invite to the survey and were asked to click on a link that launched the AR experience, which they could then view

through their phone camera. “They were able to see the hologram appear in their physical space as if she was there in the same room as them, and creating the sense of physical presence,” adds Kuzmina.

The results showed participants in the AR group of the research provided better-quality insights, typing longer responses and including more relevant information. “We did see a significant impact on the word count for the AR cell, and a lot more meaning and a lot less junk – fewer keyboard slams and less rubbish,” Kuzmina explains.

However, there was one significant issue – the AR survey had a 93% dropout rate, with 1,478 participants entering the experiment, but only 98 completing the survey. The dropout rate for the video introduction by the human researcher was 29% and 28% for the traditional survey. “Although we did see an increase in engagement, it is not viable at the moment to burn through that much sample, at least not just yet,” Kuzmina concludes. “While video is largely accepted and adopted within our industry, AR is new to most.”

This led to the second experiment, which built on the relative success of the survey with the introductory video by repeating the experiment using

an AI-generated video, with 409 participants.

The experiment again had three parts: one with an introductory video featuring an AI avatar; another with the same AI avatar video, followed by an open-ended question asked by the avatar; and, finally, a standard survey as a control.

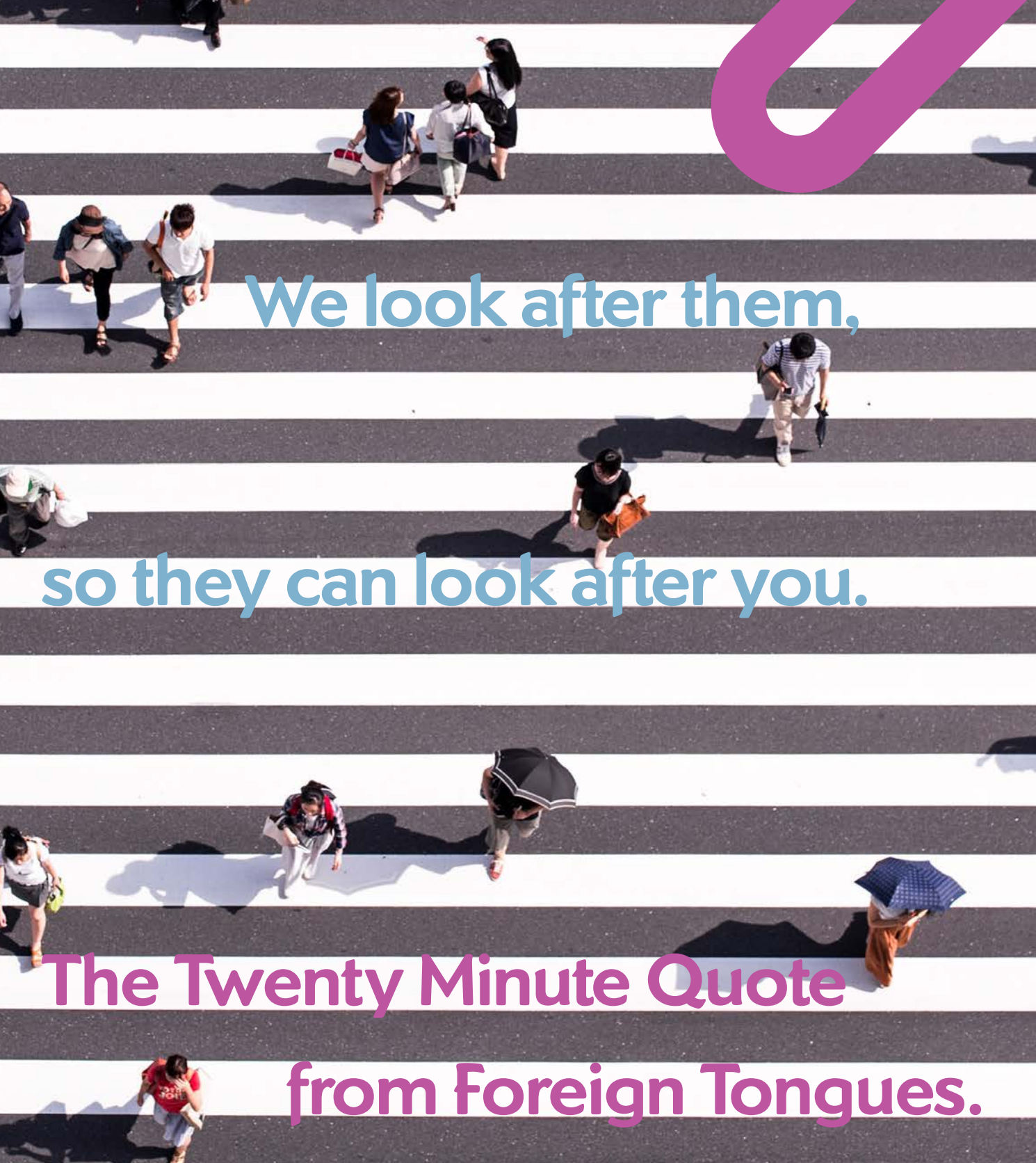
“We needed a scalable solution, which is why we used generative AI, which is booming,” says Kuzmina. “It allowed us to generate an avatar to say pretty much anything you want thanks to real-time media synthesis technology. We hoped it would still feel human enough to increase engagement.”

The research found that an AI-written question generated 44% more words within survey responses than a standard survey question written by a researcher. There was also a 150% increase in concurrent themes, which help explain how themes that emerge in the research are connected and tell a story. “It was almost like having the AI avatar generate some sort of obligation from participants to be more helpful – not just say they like something, but actually explaining it in their own words,” says Kuzmina.

For engagement – defined as whether people wanted to complete the survey, found it enjoyable, felt their answers were important to the research and that the survey was worthy of their attention – the generative AI avatar came top, followed by the control and then the AI video asking the additional open-ended question, which came bottom of every engagement metric. Kuzmina says that the ‘uncanny valley effect’, where robots and avatars that are too similar to humans can be more off-putting than more obviously fake avatars, could have played a role, given the increased length of time the AI avatar spoke in the second section of the experiment. “People who saw the video twice leaned more to negative impressions and responses,” she adds. “They didn’t hate her completely, but there is a tendency to lean towards a more negative domain. It is important to find the right balance. The avatar did increase engagement, and we saw deeper, more meaningful insight. But we also found too much can be weird. It is important to experiment and understand these things before jumping into something new and shiny.”

The next step of the journey will be to try new voices for the avatar and to test it in languages other than English, exploring whether there are different reactions, as well as the potential to improve research with children. But most of all, Kuzmina says, there is a need to “bridge the gap between old and new, and take participants on a journey that doesn’t alienate them”.

With generative AI growing quickly, the opportunities for further experimentation are on the horizon.



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The power of instinct and context



It seems wrong of me, as the analytics columnist for *Impact*, not to mention artificial intelligence (AI). I'll be honest – I've been skirting around the topic for a while. The reality of writing for a quarterly means that my content is due to be with the editor about two months before it's published – and that can be a real sticking point when it comes to topics that move fast. AI, as we've all seen, is certainly one of those topics.

On the news the other day, ChatGPT and AI, in general, were described as 'the new industrial revolution'. That is big. Some things come and go in this industry; you hear buzzwords being thrown around and then suddenly disappear. AI is not one of those buzzwords. In fact, the noise just seems to be getting stronger and stronger, with more people asking questions and wondering what the fuss is about (and a large proportion wondering if they'll lose their jobs to it anytime soon).

Let's start there. As far as I see it, no – you will not be losing your job. The number of people employed in the research and analytics industries may fall by a small percentage, but you will not walk into the office (or join a Zoom call) and see a robot sitting where Pam used to sit. Generative AI tools (that is, AI tools that can generate new data themselves) will become normalised in the industry for their ability to streamline certain arduous processes, making you more efficient at your job. This is where the small percentage decrease may well come from – we might end up with a team of 28 instead of a team of 30 because everyone is more efficient.

Having said this, there are multiple reasons why a generative AI bot will not be sitting at your desk doing your job for you anytime soon. Turns out, being human has its advantages. I recently read an article that explained, in scientific terms, why a 2.5-year-old toddler is smarter than generative AI. AI uses a large dataset to detect patterns and generative AI then uses those patterns to generate new data, similar to the old data it's already investigated. Toddlers (and humans in general) do not need a

large dataset. You can point to a lake and say 'look at those boats', and, because of the human ability to understand context, a toddler would clock what a boat is. An AI tool would need to be fed thousands of data points explaining what a boat is before that link is made.

As a human, you're also much better at interpreting analysis and results than an AI tool. You can look at a headline and your gut will tell you 'nah, that can't be right'. This instinctual feeling that comes from your expertise, combined with your personal experience and the context of the situation, puts you in a much better position to understand whether things 'feel right' or 'make sense'.

Another way in which you have the upper hand over AI is in disseminating and communicating the findings of your work. Yes, you may well use generative AI to help structure your story, or proofread your work, but you know your audience better than the AI. You know the tone of voice that's appropriate, how to land a difficult

message, and the context that's needed.

All in all, your odds are looking pretty favourable. That doesn't mean it's time to sit back and relax – in fact, very much the opposite. Glance at an agenda for any high-profile event in the research and analytics space now, and you'll see several talks on AI, ChatGPT, the metaverse and more. People are getting to grips with these tools and making them part of their day to day. If you're not, you will eventually get left behind.

The good news is that there are countless resources online, many of which are free, to learn the ins and outs of these tools. So, get out there, get your inquisitive hat on, and get your hands dirty. Download them and have a play for yourself. Get involved in conversations and hear how others have been using them – and learn from their mistakes.

You might be better than these tools in isolation, but you'll be even better again once they're part of your everyday toolbox.

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“Some things come and go in this industry; you hear buzzwords being thrown around and then suddenly disappear”
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An optimistic outlook

After being charged with murder and acquitted at the age of 18, Kenny Imafidon wrote the *Kenny Report* about the experiences of young people who drift into gangs. Now, Imafidon – founder and chief executive at ClearView Research – has written a memoir, *That Peckham Boy*, which explores the experiences of people at the fringes.

Katie McQuater caught up with him to talk about the book, inclusive insight and how researchers can foster optimism in society

What prompted you to write *That Peckham Boy* now?

I have been keen to share the story I have to share. I started in 2017, so I've been writing it for ages. It's funny, I don't think I'm actually that enthusiastic about writing. I just really understand the importance of communicating. It's definitely a long-term project for me.

The book is described as 'a real-life manifesto calling for positive change for those on the fringes of society'. What is the biggest challenge for marginalised people?

One of the big things I'm trying to do with this book is sow seeds of optimism and hope. Hopelessness is a big challenge in society that I don't think we spend enough time looking at how we can overcome. A lot of the work I'm doing, whether it's in research or in any other arena, is about this. There are challenges and life is difficult in many ways, but, for me, hopelessness is one of the biggest things that's growing. That's something I try to do on a personal level and, hopefully, through this book as well.

What could the research industry do differently to foster a greater sense of optimism in society?

When doing work with so-called marginalised groups, a lot of the time we focus on the deficit in these communities and not on the assets – we should have more of an asset-based showcasing of insights as well. It's about saying, 'despite all this, we can see clear, strong signs of community'. It's something we challenge ourselves on. It's very easy – people want to know the challenges and barriers – but it's also about asking, 'what are the assets?'

There are other communities we can look at, outside of the ones we identify with, and say 'OK, this

community is really good at doing this. We could do that better'. I could argue that, in Britain, we don't really understand community in the way a lot of places in Africa and Asia do, for example.

We could all, myself included, be better at taking an asset-based, rather than a deficit-based, approach when showcasing insights. You could read through all the research and say: 'This community is one of the most resilient communities, despite all the odds.' It allows you to ask different questions.

Even looking at myself, I could think 'woe is me'. I grew up in a single-parent household; however, there are traits that my mum has instilled in me that are priceless. Often, we're just looking for what's missing, what's lacking. And if the media keep pushing that out, and we as researchers keep pushing that out, where do people see the hope?

One of the things about the book is that it's not just me sharing a memoir; it's also an opportunity for me to talk about societal issues and it allows me to open up those questions. For example, if you know that our criminal justice system is the way that it is – and we send people to prison and they cost us, on average, £40,000 a year – do you think that is genuinely value for money? These are the questions that we, as researchers, can begin to ask.

There are a lot of areas where we could be more provocative, to get people to look at things through a different lens. Like, what would you want prisons to look like, based on the fact that 99% of people are going to leave one day? How you'd design it, and what you'd want to happen, would suddenly change.

That's the power of research and the reason I got into it in the first place. It's very important to understand the power of 'what is', but we should still be able to dream and ask 'what could it be?' We don't really see enough of that.

You told *Impact* in 2019 that part of the reason you set up ClearView was poor decision-making in politics, business and charities. Has there been any improvement in the use of evidence?

Yes and no. There's much greater awareness around nuance and differences since we started this work. Some of the things we flag or mention are now becoming more mainstream, which is positive. However, trust in data has become a heightened issue.

The pandemic highlighted a lot of the differences or disparities. Some of that was born out of people not making the right decisions or thinking through things beforehand, which they could have. I think we can

agree that, in a lot of places, evidence was already there. There has been progress; however, there are external factors that have forced us to get to this point.

Have your priorities changed since founding ClearView?

It's always been about making sure research is more equitable and, at the same time, looking after people who participate in our research. Those things have remained the same. We may have had to adapt tactics or approaches because the world has been shifting, but the heart of what we're doing is the same.

Cost of sample continues to be an issue for more inclusive research. How can this change when this systemic barrier is in place?

It's about being honest – the cost is the cost. On a practical, normal-citizen level, I don't really have much choice about my water bill, do I? The costs are the costs and I just pay them.

People are always going to try to cut corners where they feel it's acceptable to cut corners. We're always clear with this; we focus on speaking to people with

diverse backgrounds, and that could be people who identify as white.

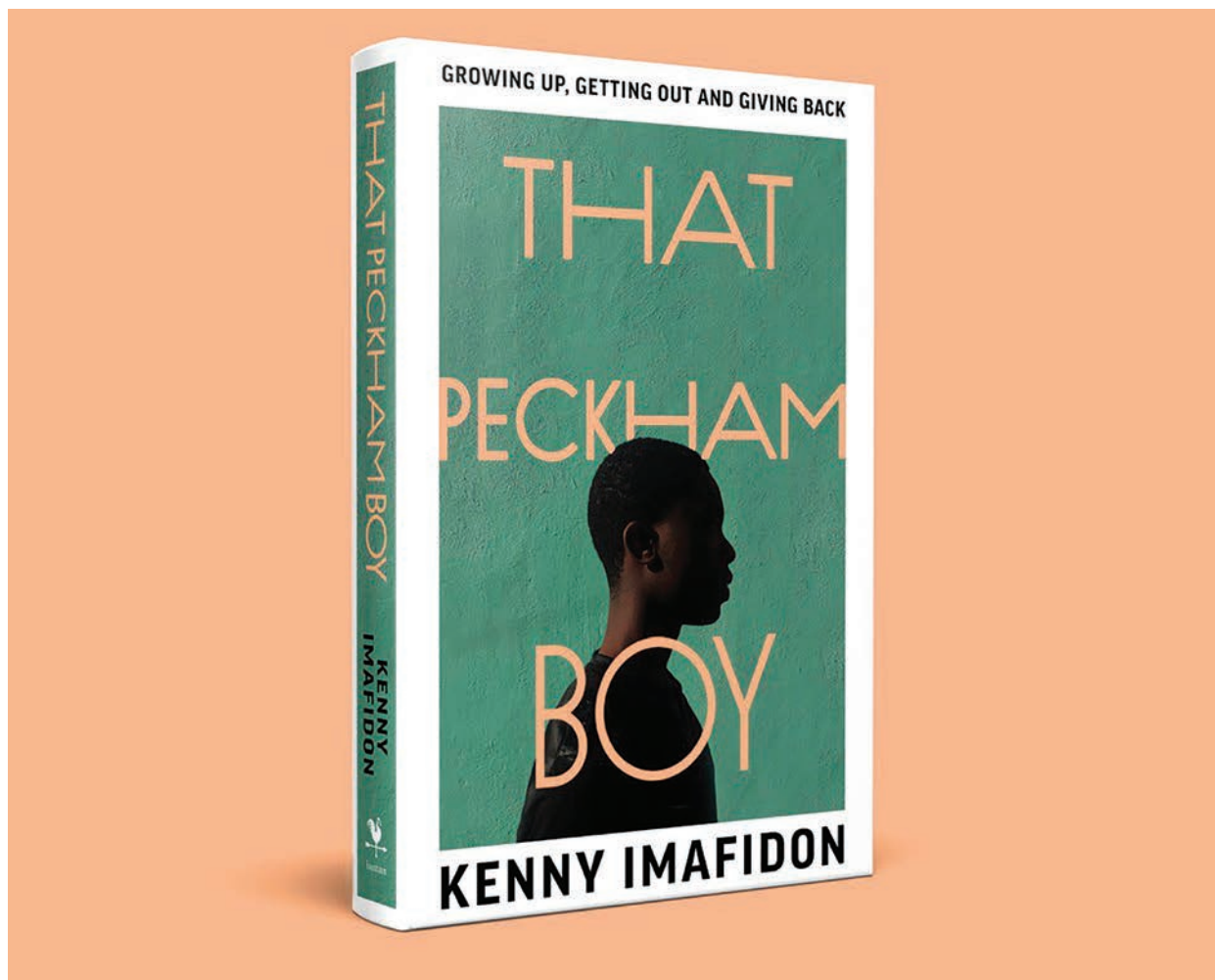
When talking about marginalised research, people have an idea in their head, but there are so many people who have never been invited to take part in research – never ever been asked what they think. So our key thing is not just about doing the research; it's how to engage people so that this stuff becomes normal.

Sometimes, the issue is that we need to make it clearer, for example, what a client won't get as a result, and what they could gain [if they spent more]. A lot of the time, that doesn't happen. It's about saying, 'if you want these demographics, here's the cost benefit of doing so'. As service providers, we need to be clearer and to play more of a role in showing the cost benefits of doing so.

Has there been positive progress in the industry's inclusion conversation in the past few years?

Yes, I think in terms of the stuff that MRS is doing – Rebecca Cole's work on representation and the EDI [equality, diversity and inclusion] council, for example – is positive, and the work that CORe [Colour Of Research] and other groups are doing. People have been much more intentional about advocating, and making sure that this conversation remains quantitative – whether that has shifted the hearts and

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"It's very important to understand the power of 'what is', but we should still be able to dream and ask 'what could it be?'"
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minds of people is different. I think the minds of people have changed, but I don't know if their hearts are yet to follow. The heart is a different story.

There are enough groups and players contributing towards more inclusive research and, to me, that is very positive. A lot of this has come to the forefront through big global external things, like the murder of George Floyd.

What should research businesses do differently to address systemic inequalities in society?

One of the simplest things each individual can do is be intentional about going on their own journey of understanding the system in the first place, to know how they can tackle injustices. But you have to intentionally seek to know and understand that system, and engage and partner with people who can do that for you.

There's so much I don't know, but I'm happy to find people who have a better understanding. Having periods of your life when you are invested in all those different topics has value – I do think there's a lot of value researchers can bring to society.

It's sometimes very easy to be passive to the [research] process, so you just keep doing it – gathering data, analysing and interpreting – but there's way more.

Also, it's about never forgetting that when people do share this stuff with us, there's a responsibility to make sure that we carefully share that, and that it's from an asset-based place, but not denying the reality of the truth. It's very hard and it's something we're constantly trying to get better at.

- *That Peckham Boy: Growing Up, Getting Out and Giving Back*, is published by Penguin and released in July.

Under the radar

Obscure trends and subcultures sometimes make the leap from the unknown to national consciousness. But how should brands interact with the niche? By Liam Kay-McClean

Veganism is commonplace these days, a fixture on restaurant menus and in supermarket aisles, with companies fighting to bring out vegan versions of their most famous products.

But veganism was not always part of the mainstream. In November 1944, the word ‘vegan’ was coined by a group of six non-dairy vegetarians in a meeting called by Donald Watson. The movement started as a tiny subculture within the vegetarian movement, and eventually grew to the lifestyle seen across the world today.

There are numerous other examples of niche trends and subcultures hitting the big time, from punk to Pokémon, and much in between. But does the idea of a subculture resonate with a generation brought up in a digital world, where new communities and information are at our fingertips? And how should brands interact with new trends before they reach the general public?

Market research company The Nursery carried out a project to examine subcultures because of a relative lack of research, with much media coverage of the area bemoaning the ‘death of the subculture’ and the role of the internet in its demise.

The research team wanted to see how many people were into subcultures and what modern subcultures look like. Subcultures were deemed to be communities of people who exist alongside mainstream society but remain separate, and could be based around a number of areas, including music, food or religion.

This led to a small qualitative study – with 25 to 30 people – exploring their views on the subcultures they had joined, followed by a nationally representative survey with 1,805 people that examined the proportion of people involved in a subculture, as well as their attitudes and behaviours. The survey found that 56% of participants deemed

themselves to be an active member of a subculture: 75% considered it a key part of their identity, with a wide range of reasons for joining.

“For some people, it was about creativity; for other people, it was more about making friends,” says Natalie Webb, associate director at The Nursery.

The Nursery’s subcultures research has fed into another project carried out with marketer Helen Edwards, ‘Marginal to Mainstream’, which has since been published as a book based on the findings.

The researchers explored 21 marginal behaviours, such as naturism or ‘living off the sea’, and attempted to predict their likelihood of breaking through and becoming popular. This was done through a nationally representative study in the US and UK, as well as qualitative research through 10 focus groups across the two nations.

Subcultures and niche trends can burst into the mainstream – see punk, for example – but quite often live outside the knowledge of most of the population. However, this does not mean that companies should ignore them. As the book says, “if you’re looking for high growth, don’t start with something that’s already grown; start, instead, from something small, marginal, promising”.

Finding links

Steve King, co-founder and chief executive at Black Swan Data, says that the most important factor behind determining which niche trends and subcultures enter the mainstream is their connection to wider societal shifts – for example, veganism’s relationship with the broader environmental movement and shift towards healthier lifestyles.

“The trends that appear and disappear aren’t necessarily connected to bigger trends,” King explains. “There’s no consumer driver that is changing people’s lives. You can tell if a trend is going to be successful or not by the environment around it and what it is connected to, and whether those things are also on a trend journey. They can become quite predictable once you understand the science behind it.”

How a brand and society interact with one another provides the best prediction of success (or otherwise) for a company’s foray into a niche trend, according to Martin Raymond, editor-in-chief and co-founder at The Future Laboratory.

“It’s about using the current trend filters in the market, then overlaying a brand filter for what it means, what the future of this sector is within the context of the likely future scenario,” he explains. “We use all this to forward extrapolate trends that





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“You can’t just take the aesthetic of a subculture and stick it on a product. You have to be part of the subculture”
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will impact the way businesses work, from customer services to developing new products and how to market them.”

Then there is the role of the internet. “The internet has changed trend forecasting, with an ever-faster lens speeding up the process,” Raymond says. “Consumers and businesses are better connected with their communities through social networks; we can track innovators more efficiently, and we are entering an era of Web3 that looks set to impact the way communities are created.”

This does not mean that brands should automatically seek to engage with every niche trend or subculture entering into wider public consciousness. “We looked through brands who

had associated themselves with a subculture and had done it well,” says The Nursery’s Webb. “But the biggest lesson was that, if you are going to do it, you have to be respectful. You can’t just take the aesthetic of a subculture and stick it on a product. You have to be part of the subculture – you can’t just sell a product to a subculture because you will probably not get it right unless you are [part of] one.”

Take shoe brand Dr Martens, which has long been associated with underground movements such as the punk and Goth subcultures, and has sought to maintain its alternative credentials despite its rise in worldwide popularity.

Black Swan’s King agrees that businesses must consider whether they have earned the place to get involved in a subculture – whether they can engage without being seen as bandwagon-jumpers or alienating their existing consumer base.

“Sometimes, a trend is a step too far for a brand,” King adds. “Smart brands will look at what trends they are already associated with and, therefore, whether they have a ‘right to play’ in the area where the trend is. They will ask that question before they go in. If they don’t, they can look idiotic.”

Rethinking the gap



Often, when encouraged to change particular behaviours, people say they intend to change, but fail to follow through. Using the latest insights from behavioural science, however, there are new ways in which this intention-action gap can be reduced or eliminated:

- Can we build stronger intentions for behaviour change using more lateral motivations and reasoning?
- Can we make intentions stronger by harnessing societal awareness to create more pressure to change?
- Can we make the desired behaviour change easier to achieve?

One idea is to ask if we are building the intention to change in the most effective way. For example, recent work has found that it might be productive to highlight a more direct personal gain to build stronger intentions to change.

Abstract or collective societal goals can sometimes lack a more appealing ‘what’s in it for me?’ angle and fail to turn intention into action. A recent trial by Unilever and the Behavioural Insights Team found that using climate pragmatism and climate-optimistic framing via influencers on TikTok and Instagram increased intentions slightly, but it had no impact on whether consumers then put any of 14 specific sustainable behaviours into action.

The more someone feels an action or behaviour benefits them or aligns with their identity, the more likely they are to do it. Accommodating an action to suit their identity in some way might be more effective than getting them to change their point of view.

Recent work by The Behavioural Architects (TBA) for the New South Wales Department of Planning and Environment in Australia, encouraged Sydney citizens to plant a tree in their garden. Rather than calling on (guilting) people to do their bit for the environment and climate change, TBA’s strategy invited them

to create a haven for birds in their back garden, make a shady space, or grow fruit. None of the messages specifically mentioned the word ‘tree’, as many people had negative associations about trees being too big to plant in their backyards. This campaign strategy led to more than one million trees being planted in the space of a year.

Similarly, research on how to encourage parents to use reusable, rather than disposable, nappies found that the personally motivating factor of having more space in the bin worked more effectively than a ‘save the environment’ message. A week’s worth of disposable nappies takes up a lot of space!

A recent experimental trial by Sofia Deleniv, Sarah Jane Fraser and colleagues at the Canadian government’s Impact and

Innovation Unit found that Canadian homeowners with little prior knowledge of heat pumps were least convinced by environmental arguments for heat pump adoption. Highlighting health benefits driven by better indoor air quality was more effective, driving higher interest in adoption.

A second approach is to make people more aware of others’ approval of a behaviour. Even if consumers approve of a behaviour and intend to carry it out, they probably won’t do it if they believe ‘other people’ don’t think it’s important, don’t approve of it, and wouldn’t do it. This phenomenon is particularly pertinent for sustainable behaviours.

Social change organisation Rare recently built a Climate Change Index and found a substantial gap between what people thought others should be doing and what they thought others believed – what it terms the ‘normative bubble’. For example, eight out of 10 Americans believe people should be wasting less food, yet they also assume only five out of 10 Americans known to them think this as well. Reducing this gap by building social awareness, with stronger communication about what other

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“It might be productive to highlight a more direct personal gain to build stronger intentions to change”
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people approve of or are actually doing, could increase the social pressure to act.

Research conducted by Erik Thulin and Abdurakhim Rakhimov in 2019 found that someone's beliefs about what others were doing was the only strong, consistent predictor of intending to take impactful, sustainable actions – for example, switching to an electric car or a renewable energy tariff. In contrast, neither climate beliefs nor political orientation were significant predictors of intention to make sustainable behavioural changes.

Finally, a third idea might be to adopt what is known as the 'tiny habit' approach. If we feel we're asking too much of ourselves, aiming for big (potentially disruptive) changes can be daunting and could make taking action feel too hard, so that – despite strong intentions – we let ourselves off the hook. Often, people feel it's all or nothing.

If we lower our goals and, instead, intend to do something occasionally, or when we feel able – or do just a little – we might achieve more than we thought, especially collectively, and especially if we make that socially acceptable. For example, society approves of eating 'less meat', 'no red meat', or having 'meat-free Mondays', without the pressure to become fully vegetarian. Parents daunted at the thought of using reusable

nappies might feel more able to do so if they set themselves a goal of using a hybrid system – perhaps using disposables at night, or when away from home.

Research by Ryan E Rhodes and colleagues in 2021 found that 'goal dimensions' – meaning how hard the goal is to achieve, its priority and how much it conflicts with other goal behaviours – affected how much intention resulted in action. This means that making the goal less difficult, or less conflicting with other priorities, might reduce the size of the intention-action gap, making the behaviour more achievable and, therefore, more likely.

Checklist for reducing the intention-action gap in research

- Are there some personal benefits that could strengthen intentions? For example, financial gains, resource gains, reaffirming or communicating identity, time-saving benefits.
- Are there misperceptions of social norms? What do people think others believe and approve of? What do people think others do?
- How can the action be scaled down to make it easier to achieve, at least some of the time?



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Naming the end client



It is a conundrum, we know. Do you need to name the client when conducting research? What are the challenges of doing so and are there any exemptions?

The MRS Code of Conduct states that ‘members must disclose the identity of clients where there is a legal obligation to do so’, and states that ‘where files of identifiable individuals are used – e.g., client databases – members must ensure that the source of the personal data is revealed at an appropriate point in the data collection’.

There is an obligation to name a commissioning client in three main scenarios:

- Client is the data controller or joint controller
- Client is the source of the personal data
- Client is receiving personal data from a research activity.

Additionally, the identity of the client must be revealed when data collection is undertaken if clients require personal data from a project.

First, what is a data controller?

The data controller determines the purposes for which, and the means by which, personal data is processed.

If your company/organisation decides ‘why’ and ‘how’ the personal data should be processed, it is the data controller. The UK General

Data Protection Regulation (GDPR) draws a distinction between a ‘controller’ and a ‘processor’ to recognise that not all organisations involved in the processing of personal data have the same degree of responsibility. The UK GDPR defines these terms:

- **‘Controller’** means the natural or legal person, public authority, agency or other body that, alone or jointly with others, determines the purposes and means of the processing of personal data.
- **‘Processor’** means a natural or legal person, public authority, agency or other body that processes personal data on behalf of the controller.

If you are a controller, you are responsible for complying with the UK GDPR – you must be able to demonstrate compliance with the data protection principles and take appropriate technical and organisational measures to ensure your processing is carried out in line with the UK GDPR.

The determination of who is a controller (DC), joint controller (JDC), data processor (DP) or third party is a question of fact rather than contractual stipulation. It is based on a determination of the purposes and means of the processing and, essentially, the level of decision-making power exercised.

Depending on the type of research project, a client may be a third party, sole data controller or joint data controller in line with the level of autonomy and responsibility the client exercises over the personal data being collected. Similarly, a research supplier may be a processor, joint controller or sole controller. Importantly, it should be noted that receiving personal data is not the only measure for determining if you are a controller in a research project. If you set a purpose – for example, issue a commercial question to a researcher – you are rendered a controller. The key to determining the status of each party in research data collection is

knowing the level of control exercised and understanding where the decision-making authority is held.

Numerous legal cases have tested whether access to identifiable data is key to determining whether a controller relationship exists. These cases have determined that an entity does not need to have access to personal data to be considered a

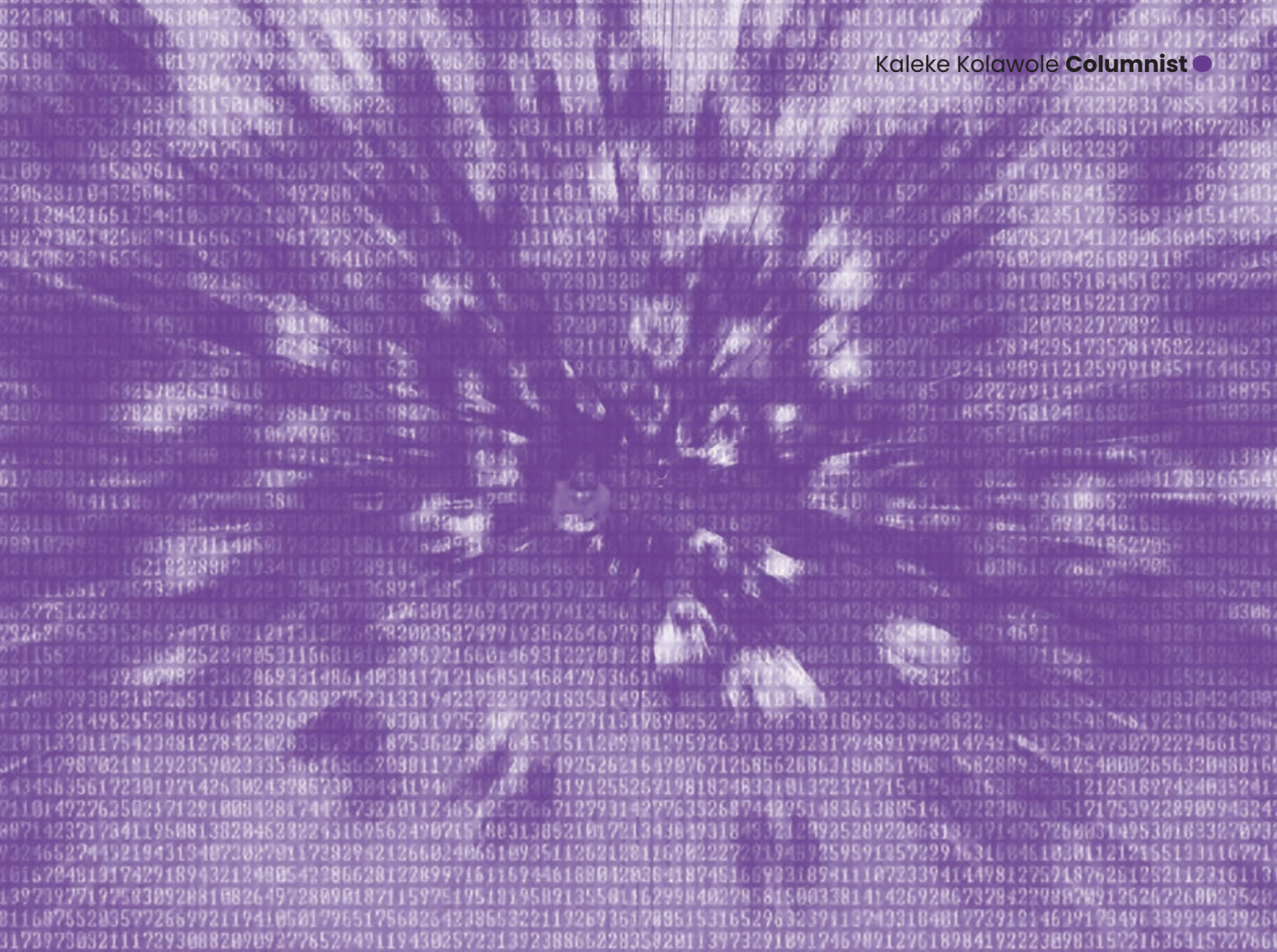
controller. It is enough if a business determines the purposes and means of processing, has influence on the processing by causing the processing of personal data to start (and being able to make it stop), or receives the anonymous statistics based on personal data collected and processed by another entity.

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“We acknowledge that naming the end client is not a favourable position to commissioners. It can erode the principle of ‘confidentiality’”
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What are the challenges with naming the client?

We acknowledge that naming the end client is not a favourable position to commissioners. It can erode the principle of ‘confidentiality’, introduce bias and reduce the robustness of a research project. Naming the client can also:

- Reduce methodological rigour (e.g., bias responses where the client’s identity is known up front; adversely impact on trend data where attitudes on behaviour etc. are measured over time, as results will not be comparable)



- Contravene regulatory controls that seek to ensure there is a clear distinction between direct marketing and other activities (e.g., introducing client name may seem like disguised promotion; routing participants to promotional pages of a client may appear to be a direct marketing activity)
- Impact on the use of methodologies such as spontaneous awareness (e.g., measuring how many participants can recall a brand name or company material without any assistance on behalf of the interviewer)
- Impact on research that may be ‘commercially sensitive’, such as product development
- Contribute to information fatigue, such as in omnibus surveys, which collect data for a variety of clients and may require disclosure of the names of multiple clients and their privacy policies.

Are there any exemptions?

Article 13 of the GDPR states ‘where personal data relating to a data subject are collected from the data subject, the controller shall, at the time when personal data are obtained, provide the data subject with: the identity and contact details of the controller and, where applicable, of the controller’s representative’.

There is no exemption or derogation from the legal obligation to name a controller – it is an absolute requirement to provide transparent information about controllers to data subjects and is in line with the GDPR principles of ‘fairness’ and ‘transparency’. However, we consider that there is some flexibility at the point at which a controller must be named.

We interpret the requirements in the GDPR on naming the data controller as providing some leeway on the point in time when the controller must be named.

It is important that the data controller is named as part of the single process of collecting personal data, but this may be more appropriately done at the end, rather than at the beginning, of a survey.

- It must be made clear to data subjects that the data controller will be named at the end of the data collection exercise.
- Assurances must be provided to data subjects that any personal data collected will be deleted if at the point that the data controller is revealed they object, wish to withdraw their consent and/or no longer wish to participate.

This approach is most appropriate when no personal data is being shared with the end client, but researchers may also consider using it in other circumstances.



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It's all about our people

The special report in this issue of *Impact* has focused on people and talent. Covid-19 provoked a re-examination of how companies value and reward their staff, in both the commercial and public sectors. Employees reassessed their work-life priorities and many resigned; many more changed their working patterns.

Government data showed a fall in economic activity in most working age groups. We reported on the immediate effects on staff retention and morale in the MRS report *Retention and Recruitment in the Research and Insight Sector (2022)*.

Last year there was deep concern in the sector as staff retention seemed to plummet, but most agencies are now telling us that this appears to have stabilised. Nevertheless, employers are having to find new ways to reward staff in these difficult, inflationary times.

Our own MRS guidance on how to support your staff during this period of inflationary pressure has plenty of recommendations.

Personal development is a less tangible, but increasingly important, reward, as demonstrated by the success of the MRS Mentoring Scheme. Since its launch in 2016, 201 members have been trained as mentors and 310 have been mentees. So far, nearly 15% of all members have benefited directly from the scheme.

The feedback has been overwhelmingly positive – here's a typical response from a mentee: "I've rediscovered my mojo at work, grown in confidence, and have a clearer idea of what I want from my career."

Furthermore, this amazing programme is FREE to individual members; it's an amazing benefit and I would encourage more members to participate.

Other areas of importance to staff and potential new talent are the working practices of a company, and the level at which staff feel welcome and supported by a clear set of ethical standards by which their employer operates. Our last equality, diversity and inclusion survey showed clear improvement in many facets of workplace practice. The effects of the MRS Inclusion Pledge and other initiatives in this arena are becoming noticeable (MRSPride, MRSUnlimited and &more, as well as the networks we support, WIRe and CORE).

There is more to do, and an updated Inclusion Pledge is on the way, with new commitments on how we do research (Representation in Research, as well as commitments to those with visible and invisible disabilities).

Finally, attracting and retaining talent is about the pride we have in our work and the recognition we receive. I am delighted to see an encouraging number of submissions for our Research Heroes and EDI Changemaker awards.

Sector and MRS news

Updated glossary

A new glossary of research terms has been updated and published on the MRS website. In the 10 years since the initial glossary was published there has been an explosion in methods and platforms. As a result, the online glossary has grown from just less than 100 entries in 2012 to nearly 250 entries today.

New Code of Conduct 2023

Revisions have been made to the previous 2019 version of the MRS Code of Conduct to reflect evolving ethical best practice in research. The changes include clarification on Member and Company Partner obligations, a wider scope, including analytics, focus on participant wellbeing, and clarity on representative sampling.

Spanish foundation course

The MRS Foundation Course in Market Research is now available in Spanish, along with the associated Certificate in Market Research. This introductory online training will be accessible to overseas teams in Spanish-speaking countries. Contact the MRS Qualifications Team for more information.

Making the most of your membership

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

Awards case studies



Learn from the best in the sector

Each year, the winners and finalists from the MRS Awards reveal how they have used research in projects by providing case studies. Members get access to the full range of case studies from previous finalists and winners for the range of categories. Members tell us that they find these invaluable for their general knowledge on innovations in the sector, as well as when making applications to upcoming award submissions. See how others are tackling research in social policy, sustainability and analytics, and more in your MyMRS.

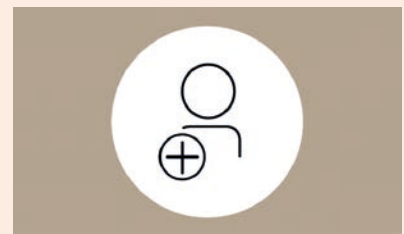
The Code of Conduct



Get support with professional standards

Membership is a clear signal that you are part of a profession that delivers to the highest possible standards. The backbone of professional standards is the MRS Code of Conduct. The code has recently been updated, widening the scope to include participant wellbeing and representative sampling. To support you in delivering high standards, members get access to the Quarterly Standards and Policy webinars run by our in-house experts, as well as use of the Codeline service that gives advice on best practice on research standards. It's the invaluable toolkit for many members.

Your preferences



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

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- The benefits available in your MyMRS account include: **GDPR resources; pre-recorded webinars; the Sage Research Methods; guidance on the Code of Conduct; case studies; and IJMR (for CMRS and Fellows)**

www.mrs.org.uk/membership/benefits

Diary dates

Training Highlights

Gamification in Market Research (Online)

Discover the psychology and science behind gamification and learn a step-by-step guide to transform your online survey projects into a context-driven gamified design.

7 and 12 September

Online Qualitative Techniques (Online)

Get the latest thinking in online qualitative research and learn how you can apply the techniques, including communities and online ethnographic research.

13 September

The Science of Behavioural Change (In-person)

Make sense of the theory, plus get practical tools and step-by-step templates to apply the latest behavioural science to better influence behaviour in the real world.

14 September

Semiotics Made Practical (Online)

Learn the basic theories and techniques of semiotics, as well as how it fits into the wider research process, giving you the chance to do your own hands-on analysis.

19 September

Infographics and Insight Visualisation (Online)

Learn how to think creatively about data and be playful with findings

Professional webinars and speaker evenings are free for members.

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20 September

Presentation Delivery Skills (In-person)

Improve your face-to-face communication style for delivering engaging presentations.

21 September

Professional webinars

Addressing the gap in representation: attracting black professionals into schools

Only 2% of UK teachers are black, and even fewer of these teach STEM. Discover the most up-to-date findings on what works to attract black STEM teachers into the profession.

13 September

Narrative research: The only way to predict future behaviour

Discover the value of narrative research in predicting future behaviour, and find practical advice on how to gather and analyse consumer stories for maximum impact.

8 November

Applications of behavioural science to quantitative research

Our final webinar of 2023 shares powerful real-life case studies, theory and tools, to show how you can make the most of behavioural science in quantitative research.

6 December

Conferences

B2B Research Conference 2023

Book your place at the popular in-person B2B Research Conference, to hear how B2B leaders, from Ford Motor Company, Shell, Maersk and British Gas, are employing a range of methodologies to help them adapt to new expectations and transform business strategy.

21 September

Generation Z Summit

This globally connected, digital-native generation is reshaping society and the workplace. As Gen Z's buying power and social influence grows, how are organisations adapting to appeal to changing needs and ideals? Find out at the new Generation Z Summit.

12 October



Professor Claire Langhamer, director of the Institute of Historical Research, is a social and cultural historian of modern Britain who specialises in the history of everyday life, especially the experiences of women and girls, and the history of feeling. She is a fellow of the Royal Historical Society and a trustee of the Mass Observation Archive

1 What can history teach us about consumer behaviour here and now?

Fundamentally, an understanding of history allows us to place current behaviour in context. It reminds us that behaviour is subject to long-term shifts and to quite dramatic short-term changes. Thinking about the past helps us to better understand the present and, possibly, build towards a better future.

2 Much of your work focuses on the history of feeling, but it is often difficult for researchers to capture this accurately. What is the biggest challenge of researching emotion?

One of the biggest challenges is understanding what it is we are actually researching when we study feeling. Feeling states are not always readily, or easily, articulated and, as a result, they are not always captured within historical archives. Feeling itself is also contingent on historical context. The meanings and implications of feelings – such as love, anger or happiness – in the past could be quite different from their significance today. The challenge is always to understand feelings in situ and on their own terms.

3 Should market researchers spend more time looking back?

Mapping trends over time helps us all. The simple recognition that how things are today is not how they were in the

past helps us understand that the future may be different too. It's an obvious point, but one that still needs to be made. That said, I'm not sure that it is necessarily the job of market researchers to do the work of looking back – that's what historians are for!

4 Will today's data-collection techniques help or hinder future historians in understanding society?

There are certainly challenges – particularly around the archiving and retrieval of digital material – but I have absolute confidence that historians of the future will work productively with whatever traces of the past are available to them. Some of the key types of market research – surveys, interviews, focus groups – generate the kind of rich and textured autobiographical material that social and cultural historians really value as a way of getting at lived experience. And, of course, archived market research will help future historians to understand how everyday practices, habits and tastes evolved over time.

5 Would you like to see more focus on emotion in current research methods?

There has been something of an 'emotional turn' within historical research in recent years. In part, this reflects the way the discipline has developed, but it also mirrors changes within society more

broadly. Feeling is much more visible – and more widely discussed – within political, cultural and even economic life than it was even 50 years ago. In many of today's workplaces, for example, emotional labour and emotional intelligence have distinct value. Given that emotion animates the behaviour of everyone – including, of course, researchers – it would be surprising if market researchers were not also interested in emotion.

6 What are the limitations of archive data?

There are always limitations because all data is partial, but historians are really good at thinking across different types of data to better understand the past. They are also incredibly adept at reading data against the grain once they have established why data was produced and for what purpose. Once we know that, we can think creatively about how we re-use it. Of course, it can sometimes be frustrating when whole groups of people are missing from the archive because their experiences were not deemed interesting enough to record.

7 What is your favourite resource?

The Mass Observation Archive, of which I am a trustee. For a historian of 20th century everyday life in Britain, Mass Observation offers unparalleled riches. I never tire of exploring the collections it holds and it always surprises me.



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