

● impact

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Using evidence & insight to make a difference



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in market research**

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his reggae style
into restaurants**



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Data processing is faster than ever thanks to machines, but it still
requires humans to generate the insights



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New ideas



How many times a day do you Google something? Once, twice... 20 times? What about shopping online or using travel apps? Whether we're conscious of it or not, algorithms are ubiquitous in our lives. For the way in which data is collected, analysed and acted upon has been one of the most consequential changes of the digital age – from both personal and professional perspectives.

The market research industry is grappling with all that machine learning can offer and throughout this issue the brilliance – and limitations – of artificial intelligence (AI) is explored.

Our report (p28) looks at AI from many angles – especially how it has affected market research jobs and tasks. Even where machines speed up the process, the need for human insight is not diminished.

Knowing when, and when not, to use AI is as important as how it can be used. As Ryan Howard says in the article, it's important to avoid arriving at the wrong answer, just more quickly.

Lewis Reeves, in the report, and James Oates (p62) both talk about AI bringing together more datasets for comparison, and anything that can help in that process will clearly be embraced by our industry.

Elsewhere in the magazine, the brilliance of an algorithm is demonstrated by what3words and its groundbreaking location app, while Bethan Blakeley discusses the ethical limitations of handing machines decision-making powers. This is a complex area and

one that needs vigilance in how it is controlled.

As data analytics is taking our industry into new areas, we have decided to dedicate more content to it. And that is just one change in – what I hope you'll all have instantly spotted – our new-look *Impact*.

The magazine has been going for five years now and so we thought it was time for a refresh. We've introduced some new sections: Spotlight, which will cover a broader societal trend – in this case gender identity; data analytics, including our new columnist, Nielsen's Oates; and a revamped section on MRS activity. We've also added Crawford Hollingworth of The Behavioural Architects' to our exemplary regular columnists; he will be looking at the very latest research in behavioural science.

But we've also kept plenty: our long-read report; the features exploring leading brands' insight and business strategies; the profile; and the articles that give you the latest thinking in business, science and technology.

In his column (p7), Rory Sutherland talks about the serendipity of 'finding' something and where that can lead, and how chance discovery becomes less likely in a world ruled by algorithms. I've always thought that's one of the great joys of print media and it's why all editors work so hard on the curation aspect of their job.

I hope that each issue of *Impact* gives you a chance finding, that you'll enjoy the new look and that the content will inspire and inform in equal measure. Do let me know what you think.



World view

9 Global round-up
including the luxury Chinese consumer and changing waste behaviour in the UK

Spotlight

18 Gender identity
How people respond to gender questions is shifting

Profile

22 Reggae action
Levi Roots has built his brand across music, sauces and now restaurants

Impact report

28 Machine mind
Artificial intelligence is changing many aspects of market research, as Tim Phillips explores

Features

40 The Economist
The magazine's CMO, Mark Cripps, talks about growing subscribers in an era of 'fake news'

46 Swim England
Building a base for swimming across all demographics and stakeholders with the help of behavioural science



Focus

52 Business
Building brands in a post-truth society

58 Data analytics
Geo-location innovation

64 Technology
Understanding live music

68 Science
The tipping point for change

76 Careers
The gender pay gap in market research's big players

83 MRS
Latest benefits and events for members

86 In seven
Carl Miller, of CASM, on how power is moving in the digital age



Columnists

07 Rory Sutherland



Sutherland is vice-chairman of Ogilvy UK and our regular columnist who writes with his inimitable wit and intellect on behavioural economics.

56 Lorna Tilbian



Tilbian is former executive plc director and head of media at Numis Securities. She is currently building her non-exec portfolio, as well as writing about finance.

62 James Oates



We are delighted that Oates joins the new look *Impact* as our expert data analytics columnist. He is UK analytics director at Nielsen.

67 Matt Taylor



Taylor, Twitter's consumer insight lead, has been giving his perspective on working in Silicon Valley since relocating there more than a year ago.

72 Crawford Hollingworth



As our science columnist, Hollingworth, co-founder of The Behavioural Architects, shares the latest in behavioural research.

80 Michelle Goddard



Goddard is director of policy and standards at the Market Research Society and writes about all things legal impacting the profession.



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Limited choice of online interfaces



In 2001, my wife and I did something very strange. We sold our flat in London and moved to a flat near Sevenoaks. The only strange word in that sentence is the second occurrence of the word ‘flat’. Most people who move out of London use it as an opportunity to buy a house.

As it happens, we found the place in a copy of *The Week*. There was a two-page feature on apartments for sale in listed buildings and we took a look. We were hooked.

But had we gone about searching on the internet, not in a magazine, there is almost no chance we would have learned of it. Instead, on arriving at Rightmove.com, we would have been asked ‘house or flat’. We would have clicked on ‘house’ and been shown no further properties that weren’t houses.

Since you are reading *Impact*, you already know about ‘order’ effects – that the order in which questions are asked affects people’s answers. But there is also strong path dependency in choice.

Suppose you are trying to buy a house, find a partner, book a flight or choose a toaster online. The first thing you may try to do is reduce the choice set to a manageable number – ‘elimination by attribute’. For example, you search for toasters under £50. What you never discover is that, for £55 there is a glass-sided toaster which lets you see your bread as it browns. There aren’t many innovations in toaster-world, but this is one worth paying a few extra pounds for. But you never learn about it.

Railway and travel websites are worse still – they don’t even allow you to choose what’s important to you, but assume that you only care about minimising end-to-end journey time. If you want to get almost anywhere in western France from London by train, the trick is to change at Lille rather than Paris. But the algorithm never shows you that option because, though far easier – no changing stations in Paris – it takes longer.

Similarly, if you wish to get from London to Bath, Bristol or Exeter, there are trains from Waterloo as well as Paddington.

These trains are often insanely cheap, and first class advance tickets are a bargain. But unless you stipulate ‘travel via Salisbury’ you will never learn these trains even exist: put in Waterloo to Bristol and the National Rail website will tell you to take the tube to Paddington first. This seems to me morally dubious – by hiding a cheaper option – not to mention extraordinarily inefficient, since it will lead to one line being overused and another barely used at all.

Now, if you are in a long-term relationship, ask yourself how many of your existing partner’s definable attributes you would have stipulated in advance. Yes, we all have a prior conception of what we want in a partner (or a toaster), but in reality we fall in love with someone or something and then post-rationalise our choice –

known as adaptive preference formation: we don’t know why we want something until we want it.

Would internet searches actually be better if they incorporated a degree of randomness? So that they injected unasked for wild-card results alongside the requested results? My view is yes.

In many ways, markets, like termite hills, are the product of emergence – where a collection of people performing simple tasks collectively produce something remarkable. It seems to me that one of the reasons why markets possess such remarkable collective intelligence is that the individual decisions taken within them are messy.

People may choose to buy the same thing for entirely different reasons. In choosing a car, performance, fuel economy, safety and environmental considerations will be deal breakers for some people and irrelevant for others. The net effect is that most cars are pretty good across a range of measures, precisely because they aggregate different people with different decision-making styles.

So, by imposing a regimented uniformity on consumer decision-making, online interfaces may be making markets worse rather than better. In a complex system, you do not necessarily optimise the whole by optimising each of its constituent parts.

“Would internet searches actually be better if they incorporated a degree of randomness?”

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World view

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

In Colorado, the number of people who consumed cannabis in the past six months rose from **25%** in **2017** to **35%** in **2018**

(p12)



60% of Chinese luxury consumers' shopping is done online or via mobile

(p13)

"The plastic bag tax has led to a fundamental shift in the way we shop, but other habits are much harder to break."

(p16)

26% of UK consumers have stopped buying bottled water

(p16)

"The story of 'struggle' is intrinsic to Brazil's complex social history, one in which every ethnicity has a story of how they've struggled for inclusion in a multicultural society."

(p10)

Women hold **63 seats** (49%) in the new Mexican Senate

(p14)



Two-thirds of Mexican women have experienced gender-based aggression

(p14)

Top dogs

In Brazil, dogs are not just part of the family – they also highlight important cultural observations, such as respect for hierarchy and status symbols, as ethnographic research by Ipsos Mori found



Pets are becoming more prominent across the developing world – especially dogs. They are increasingly considered a status symbol in countries such as Brazil, Mexico, Russia and Argentina, where owning a pet is a sign of wealth; it signals that the owner has enough time and money to care for it. Dogs have made the cultural transition from strays to members of the family, and from public nuisance to personal status symbol.

Yet the way in which pets are fed has remained the same; the data tells us most dogs in these countries eat human food, rather than pet food. Mars Petcare came to

Ipsos Mori with one of its biggest challenges across the developing world: how to introduce pet food as a necessary part of the middle-class, pet-owning lifestyle.

The dogs of Brazil: a cultural bellwether

Anna Rodríguez warmly welcomed us into her home in São Paulo, allowing her dogs to jump all over us as we entered. The barred windows showed us how close the house was to the neighbouring favela, even though Anna was recruited for our research as a person living in a ‘middle-class suburb’.

A classic Brazilian mother of the household, Anna was a generous host, who was always cooking. Her dogs are very much part of the family – she told us she “has eight children, not three” – and, during our day with Anna, we soon found the way she runs her home was a wonderful depiction of Brazilian society.

Brazil’s explicit social hierarchies

When conducting research in Brazil, you quickly realise that it has some interesting, complementary value systems.

First, like Anna, Brazilians are kind and inclusive, which often means caring for the weaker and older members of society. Social care does not really exist, and care homes for the elderly are not common, as people often look after their ailing parents. At the same time, however, it is entirely accepted that social hierarchies exist, and these are maintained for the smooth running of society – as demonstrated by Brazil’s remarkably high tolerance of racism and poor social mobility.

Of course, every society has social hierarchies. But it’s the way in which people achieve social status that’s most interesting, and Brazil is a fascinating case study. Social niceties prevented us from seeing these hierarchies in everyday life, but they were demonstrated beautifully by Anna’s behaviour towards two of her dogs, Bella Maria and Feia.

Bella Maria – the importance of beauty

Bella Maria (note the Catholic reference) is a pedigree Maltese. She is a beautiful, white fluffy-cloud of a dog, frequently taken to the grooming salon in Anna’s handbag – she is definitely ‘the top dog’.

In a country where beauty is a marker of success – epitomised by high levels of plastic surgery and make-up routines that take hours – Bella Maria’s beauty is a status symbol for Anna.

She gets special treatment. Bella Maria is the only dog allowed to sleep on the bed; she is first to be greeted when Anna returns home (even before Sandro, her son); and she receives a freshly cooked meal twice a day. Anna really does mean ‘fresh’; she took us to the butcher to buy

mince and, when we returned, she cooked it with onions, garlic and herbs, and combined it with boiled rice. The final part of the ritual? Lovingly laying it down as a gift for her beautiful dog – the apple of her eye.

In a culture where good looks help you get ahead in life, this apparent objectification is entirely acceptable – and actually very normal in Brazil.

Feia (translation: ‘ugly’) – the respect for those that have struggled

In contrast to Bella Maria, Feia is an old, stray mongrel that sleeps in the shed on the porch, and is the last one to be fed at mealtimes. He doesn’t get a fresh meal every day; instead, he gets the leftovers once the (human) children and the other dogs have eaten.

We immediately felt sorry for Feia, as he sheepishly sniffed around our feet, as if he had been excluded from family life.

Interestingly, however, Feia had been taken in from the street, something we did not see when doing research in Mexico, Argentina or Russia. He is also respected in the family for two reasons: he is old, which means he should be looked after, and he has struggled in life, signified by the scars and scratches on his body.

He was certainly not a dirty street dog, as he was living in the family home and had been given his jabs. However, Feia didn’t need fresh food or a soft bed. He had struggled and overcome adversity on the street, and was now a strong, healthy and respected member of the family.

The story of ‘struggle’ is intrinsic to Brazil’s complex social history – one in which every ethnicity has a story of how they’ve struggled for inclusion in a multicultural society. Showing strength through struggle is part of every Brazilian’s personal and family story, and something brands also try to embody.

Culture affects every category

Some crucially important cultural observations emerged from the research in Brazil, which Mars Petcare was able to use as part of its strategy: respect for hierarchy is observed through physical

attributes (beauty, nice products), as well as through social attributes (struggle, age) that are part of one’s life story – all deeply embedded aspects of Brazilian culture.

Translated to pet food, this insight told Mars Petcare about the importance of certain ingredients as status symbols within the family – particularly the use of meat. The freshly cooked meals could not be replaced by pet food, because they are a reciprocal offering showing respect and inclusion in the family.

Mars Petcare owns brands such as Royal Canin, Pedigree and Cesar. The strategy the company has adopted in Brazil taps into the cultural norms that we observed with pet owners by:

- Not trying to change behaviours, but rather adjusting them slightly with an improved routine
- Understanding the meaning of a ‘meal’ in Brazil, knowing that it is imbued with mutual respect – which is the same for pets and humans
- Realising that cost is always a secondary issue when a pet is truly a member of the family.

The insight challenged and reoriented the Mars Petcare strategy from promoting a mass-market product to accepting that a premium proposition was a better strategy – despite it being a low income, developing market.

By using insight gleaned from pet-owners such as Anna, with her dogs, Mars was able to increase sales by \$10m in Brazil in the first year alone.

Oliver Sweet is head of ethnography at Ipsos Mori



High times

As Canada legalises the recreational use of cannabis and attitudes towards the drug soften, BDS Analytics' Linda Gilbert looks at what to expect from an increasingly sophisticated market



Canada's robust experience with legal cannabis – it first permitted regulated medical marijuana in 2001 – is poised to expand in October 2018, when sales of cannabis to adults will be allowed. The legal pivot has implications far beyond boosting sales and tax collections, and will transform the Canadian marijuana marketplace into something familiar in certain US states: a brand bonanza.

First, the caveat. The Cannabis Act includes restrictions for on-pack branding – from logo sizes and colours, to rules against promoting 'glamour, recreation, excitement, vitality, risk or daring'. While the rules limit creativity, brands are expected to dominate in edibles, concentrates and topicals (medications).

Despite Canada's long involvement with legal cannabis, the consumer market resembles US states with medical-only regulatory regimes – where talk about cannabis remains hush-hush, outdated stigmas persist, education about the plant is minimal, and product evolution cannot compare with that of states with strong adult-use markets, such as Colorado and California. However, both states used to be in the same boat as Canada – so what happened?

First, cannabis became more mainstream. Before adult-use legalisation, the market was on the fringes, but – post-legalisation – more people began visiting dispensaries and trying different products. In California in 2018, around 60% of consumers who had used cannabis in the past six months bought marijuana or products containing it from a dispensary.

In Colorado, the number of past-six-month cannabis consumers rose from 25% in 2017 to 35% in 2018, according to our data. On average, these people are in their forties, educated, and working full-time, and about half are parents. They have begun to look

like everybody else in their community.

Messaging has also grown increasingly sophisticated and targeted. Brands no longer uniformly project variations of hippy or stoner themes, with messaging shaped around effects – such as energy or sleep. Some focus on 'wellness', and champion cannabis as part of a healthy lifestyle. According to BDS Analytics, 47% of past-six-month consumers in US legal states, and 45% in Canada, wish more products were labelled with information about what mood or effect to expect.

As the marketplace matures, brands are more explicit about potential medical applications, and higher-end dispensaries invest in extensive employee training regarding marijuana's myriad uses.

Legalisation also brings increased sales, profits and capital investments, leading to more product development. Markets in medical-only states often revolve around cannabis flower sales, with a smattering of offerings such as concentrates, edibles and topicals. But in adult-use markets, the category is much broader, with high-cannabidiol (CBD) gummies, single-serving lavender kombucha (a fermented tea drink), vape pens and salves. In Colorado, edibles and concentrates accounted for 45% of the market share in Q4 2017, up from 24% three years earlier.

Canadian authorities are keeping edibles out of the market for the next year, but the transition to a pastoral landscape is at hand. The nation is marching towards a different relationship with cannabis, one that's familiar to places with legal adult-use sales: users look like neighbours, messaging hinges more on 'wellness', and brands proliferate – with some emerging as trusted partners and market leaders.

● **Linda Gilbert is managing director of consumer insights at BDS Analytics**

- The legal cannabis market has resulted in an explosion of high-end brands and products, such as fashion-conscious smoking accessories from Tetra (pictured), Beboe's beautifully packaged upscale cannabis pastilles and vapouriser pens, and cannabis-infused skincare from Herb Essentials.
- Consumer spending on cannabis products is on the rise, according to a SoapBoxSample poll of US users. Those with an income of more than \$100,000 are more likely to purchase through a dispensary and choose edibles or vapourisers.
- However, 70% of female cannabis users feel there is still a stigma around consumption, according to a survey from Van der Pop and Canadian Viewpoint.



Bethany Vargas



The new luxe

China dominates the market for global luxury, but the motivations of its luxury consumers are shifting with a younger-buying demographic. By Katie McQuater

Earlier this year, the Chinese government reduced its import duties on consumer goods, resulting in a number of European luxury brands such as Gucci, Louis Vuitton and Hermès lowering their historically high prices for shoppers in the country.

The decision reinforced the influence of China on the world's luxury market; it's estimated that Chinese consumers account for RMB 500bn (around \$7.4bn) in annual spend, representing almost a third of global spend on luxury.

Yet the expectations of the Chinese consumer, and the qualities they associate with luxury, are different to that of the luxury buyer in Paris, London or New York. A study from Kadence International found that consumers in China are more likely to associate the qualities of 'timelessness' – relating to a brand's enduring appeal and relevance – and 'experiential' – including digital and mobile experiences – with luxury than any other market studied.

And unlike other markets in Asia-Pacific, Chinese shoppers are less likely to evaluate a brand or product through perceived 'status', the study found. Instead, they place more importance on intrinsic value, such as the 'feel-good factor'.

Kouei Kaku, managing director at Kadence China, says: "The West often looks at the luxury audience in China as the flashy kind, those made of 'new money' – and yes, for the past decade or so they have

been the biggest group of luxury buyers in China. But there are also those who are understated, valuing the more intrinsic nature of luxury brands rather than being 'show-offs'. 'Feeling good' and 'recommended by friends' are significant factors for a purchase decision."

New generation

China's luxury consumer base is also getting younger. After a five-year period of sluggish growth, spending on luxury within China grew 20% in 2017, led by women's clothing, jewellery and cosmetics, according to management consultancy Bain & Company, which found that millennials (aged 20-34) were major contributors to growth.

The motivation to purchase luxury has

become more about individual expression than a status symbol. "As the confidence and status of Chinese luxury shoppers has continued to grow, and with a new millennial-buying generation firmly in place, the importance of a traditional marque is being supplanted by a desire for individualism and self-expression," says Liana Gregorians, associate director at Mash Strategy Studio. "The next generation of Chinese consumers are less concerned with showing they belong to a French or Italian high-fashion set, and more with feeling they are setting the trends themselves, seeking out brands with their unique needs and style in mind."

Mash research in 2016 found that 25% of Chinese consumers buy luxury goods to stand out, suggesting they are more interested in niche brands that are seen as more expressive and creative, opening up greater potential for local luxury brands, according to Gregorians.

The expectations also differ when it comes to technology. According to YouGov's Affluent Perspective global study, 77% of Chinese respondents use mobile payments, compared to 12% in the UK and 15% in the US. Almost half (43%) said they read product reviews via their mobile while in-store, compared to a global average of 33%.

Social messaging apps are becoming the next frontier, according to Gregorians. "Social has become an essential tool for driving brand consideration and, although not yet playing a dominant role in purchase, the rise of innovative digital platforms, such as WeChat luxury storefronts and games – combined with growing shopper confidence – indicates huge potential."

Chinese luxury consumers account for almost a third of the global luxury market

Source: McKinsey

Sales of luxury goods in China reached RMB 142bn in 2017

Source: Bain & Company

60% of luxury shopping among Chinese consumers has been completed online or via mobile devices

Source: YouGov

In Mexico, successive administrations have promised – and failed – to tackle the rising violent-death toll. But the problem could be tackled with a softly, softly approach in future, with the election of left-wing veteran and populist Andrés Manuel López Obrador to lead the country.

López Obrador (usually referred to as ‘Amlo’) was elected on a platform of zero tolerance towards Mexico’s powerful drug gangs and the country’s endemic corruption, while standing for reconciliation, and for ‘peace and love’.

Backing Amlo’s initiatives will be a large new cohort of female politicians, elected after moves to improve gender representation. In what has become known as ‘The Year of the Woman’, females will make up around half of both houses of the new Mexican congress.

Challenge to tradition

President-elect López Obrador is no macho strongman; some of his closest associates are women, notably Claudia Sheinbaum, Mexico City’s newly elected mayor, and campaign manager Tatiana Clouthier, who is generally considered to have masterminded his election victory.

‘The Year of the Woman’ may, in future, become known as ‘The Year of Change’ in Mexico. Traditional masculinity is being challenged, with men viewed as the source and beneficiaries of ingrained corruption, ineffective politics and, of course, drug-related violence. Mexican women are shaking off long-held beliefs, while individuality is an emerging theme, particularly for the under-40s.

The increasing desire of Mexicanas to

The year of the woman

Women are more visible than ever in Mexican politics, and across the country they are shaking off long-held beliefs as traditional masculinity is challenged. By Sabine Stork and Graciela Sylva



stand up for their rights is highlighted by recent research on inclusion and gender equality, conducted by Latin American market data firm Retargetly. It identified hundreds of thousands of regional searches for terms such as ‘women march’, ‘feminista’, ‘feminismo’, ‘Me too’, ‘derechos mujer’ (women’s rights), ‘aborto legal seguro gratuito’ (free and secure legal abortion) and ‘sororidad’ (sisterhood), with Mexico accounting for almost half of all such searches in Latin America. But what does this mean for marketing to Mexican women in 2018?

Bold and energetic

Marketers across all sectors need to change their approach as women rethink familiar habits and positively embrace new products and brands. As researchers, we have noted that a significant number of Mexican women under the age of 30 are willing to experiment with new trends, experiences and ideas, increasingly identifying with a bold and energetic blend of femininity. This has real implications for targeting, and opens up opportunities for innovation in a traditionally more cautious market.

This independently minded generation is claiming the right to enter traditionally masculine categories. In the automotive segment, for example, the number of women buying SUVs has spiked significantly, with Jaguar Land Rover Mexico reporting that almost one-third of purchases are made by women.

Brands are taking an empowering tone, too. For example, Mexican dairy brand La Villita’s #YoNoTrabajo (#IDon’tWork)

campaign validates the efforts of women who chose not to work professionally to take care of their families.

A more in-your-face attack on gender roles has come from cleaning product maker Alen’s #HazTuParte (#DoYourBit) campaign, featuring versions of its Pinol, Cloralex and Ensueño brands ‘for men’, with messaging highlighting that housework isn’t the sole domain of women. Even male-orientated Tecate, the most popular beer brand in the country, has joined the fray. The voiceover to a one-minute social video, featuring mostly stereotypical images of men, says “if you don’t respect a woman, Tecate is not for you”.

Danone-owned water brand Bonafont’s recent #YoSoyAsí (#ThisIsHowIAm) campaign features women shaving, breastfeeding in public and playing ‘male’ sports. The #YoSoyAsí YouTube video had racked up more than 6.3m views by mid-2018.

Traditionally feminine categories are also supporting Mexicanas’ cutting of their mothers’ apron strings. Consumers respond warmly to the culinary aids segment, for one, issuing calls for freedom, creativity and improvisation, with inspiration coming not from mamá but from YouTube tutorials. Knorr’s latest campaigns focus on women liberating themselves from the fear of not being as good a provider as their mother, and finding time to do other things apart from look after the family.

However, Western brands need to ensure they respect local sensibilities, cultural patterns and idiosyncrasies. What

might be viewed as a mildly provocative message in the West can easily be interpreted as out of place – aggressive, even – in Mexico.

Indeed, headline movements such as #MeToo tend to look futile there, while the domestic #NiUnaMenos (#NotOneMore) campaign – a protest against violence towards women and femicide – is a highly targeted fit; a 2017 study from national statistics institute INEGI shows that two-thirds of Mexican women have been subjected to gender-based aggression.

Soft reform

While the country has seen numerous #NiUnaMenos demonstrations, the kind of activism that is common in North America and Europe doesn’t yet exist in Mexico. Street protest is generally viewed as an action undertaken by the poor, as well as politically motivated. As researchers, we need to guide our clients in the West to reflect and encourage the new Mexicana with products and campaigns that can be brave, even edgy, in a local context, but which are in line with a desire for ‘peace and love’, as the new president puts it.

While a majority of Mexican women are seeking social progress and greater gender equilibrium, they are looking for soft reform, rather than a radical revolution, in a country already plagued by conflict – and brands will need to reflect this temperate tone.

● Sabine Stork is founding partner at Thinktank and Graciela Sylva is team leader at De la Riva Investigación Estratégica

Mexico has 20.9m economically active women, the highest total since the National Survey of Occupation and Employment began compiling statistics in 2005

Women secured 49.2% of Mexico’s senate in the 2018 election – a 50% rise

223,000 women entered the labour market in 2017, the biggest increase since 2011

Source: INEGI

Women in Mexico got the vote in 1953

81% of female adults feel they live in an unsafe city/town, up from 69.4% in 2015

Source: ENSU, the National Survey of Urban Public Safety



Wasteful habits

Awareness of the harm of single-use plastic may have increased in the UK, but is this concern translating to behaviour change?
By Nick Bonney

Since he first hit our screens in the early 1950s, Sir David Attenborough has made an unparalleled contribution to our understanding of the natural world. However, raising awareness of disposable packaging and its impact on our seas could become his most significant contribution.

Since *Blue Planet II* aired in 2017, plastic has become a critical issue; it's estimated that 8m metric tonnes enter our oceans each year and, if this trend continues, the WWF estimates that we'll have more plastic than fish (by weight) in our seas by 2050.

Our research has found that more than eight in 10 UK consumers are now aware of the issue, dwarfing awareness of other high-profile environmental stories, such as diesel pollution (45% aware). According to similar Ipsos research, 41% of consumers claim to be 'very concerned' about the impact of plastics on the environment.

However, while there has been a surge in

concern, it's questionable whether we have seen a change in consumer behaviour. The plastic bag tax has led to a fundamental shift in the way we shop – since 2015, there has been an 80% reduction in plastic bag use – but other habits seem much harder to break; only 26% claim to have stopped buying bottled water, and just 20% have used a reusable coffee cup, our survey found.

Addressing single-use plastics is not just a consumer issue: Ipsos found that 40% of consumers believed it was up to the brand and/or retailer to address excess packaging.

Over the past year, a flurry of brands have launched initiatives to tackle plastic. Coca-Cola recently brought out 'reverse vending machines', offering a discount in exchange for recycling plastic bottles. Competitor Pepsi has gone one stage further through its planned \$3.2bn acquisition of Sodastream – could this eliminate bottles from the home market altogether?

As admirable as these initiatives are,

brands will have to work hard to ensure they're not just window dressing. Our research showed only 2% have heard of Adidas' Parley X running shoe, made from recycled ocean plastic, and just 5% were aware of its Run for the Oceans campaign.

The challenge remains to translate such initiatives into behavioural change. Costa, for example, made much fanfare in 2016 about its aim to recycle 30m cups each year, but conceded less than a year later that only 1% of its customers had taken advantage of the 25p discount for reusable cups.

Never has there been such an opportunity for our industry to play a part – we have the tools to help brands unlock those small changes, which together could make a big impact. Robert Cialdini demonstrated in his 2008 study how social proof could be used in an analogous problem (the challenge of encouraging consumers to re-use towels in hotel rooms). Helping brands understand and tap into the cognitive biases at the root of consumers' unconscious behaviour could be our own contribution to addressing one of the planet's most pressing challenges.

Nick Bonney is founder of Deep Blue Thinking, which interviewed 2,000 people in August 2018 with Populus Research

Richard Shotton, deputy head of evidence at Manning Gottlieb OMD and author of *The Choice Factory*, outlines how to elicit positive behaviour change.

For most problems, the simplest way to understand how to change behaviour is to use the government's framework of EAST, which states that change is more likely if you make it 'easy, attractive, social and timely'.

- Be explicit about the change you want. Spell out simple, concrete steps
- Make the problem as unattractive as possible. Don't rely on logic and facts, make people viscerally react
- Show that many people are already adopting the desired behaviours. People are strongly influenced by what they think of as normal, and evidence shows that if you make an undesirable behaviour seem commonplace, it becomes more common still
- Identify moments when people are most open to change. My research shows that, after people have undergone a major life event, their behaviour is in flux and they're more open to new ideas and actions.

GENDER

A question of identity

For younger generations in particular, gender is increasingly seen as a spectrum rather than a binary choice. What does this mean for those trying to understand people's behaviour?

Jane Bainbridge reports

One of the first selections made by respondents in any form of market research is a gender one. Tick the box – male or female. But where only a matter of years ago these were the sole options given – and expected – today this is too restrictive.

For gender – the way an individual identifies, rather than their biological sex – is no longer seen as a binary state, but more of a spectrum.

The changing nature of gender identity rides on the wave of widespread shifts in society's attitude to all areas of sex and gender and a generally more progressive and inclusive outlook.

Harshadha Balasubramanian, cultural anthropologist at marketing strategists Kingfisher Consultancy, says: "The social and cultural norms that have upheld the female and male binary state have started to crumble. The real tipping point would arguably be movements like feminism, which asked people to take identities more seriously and give more respect to people's individuality.

"Once we started to acknowledge differences in people and diversity, we started to encourage people to express themselves more freely. If it is a social construction, then people have the right – and the room – to create their own identities and how they are perceived."

Ruairi O'Shea, analyst at strategic forecast consultancy Trajectory, adds: "This recognition of gender as non-binary has become prevalent enough – though still possibly a minority view – to be spoken about in certain areas of society as fact.

"As much as we're told that people are tired of experts, when expertise consistently says that gender is non-binary, it is a spectrum – and when that understanding becomes the norm among young people – it begins to gain traction."

Opinions, attitudes and acceptance change as the demographic centre of gravity shifts and each generation has more progressive attitudes than the one before. So, while opinions don't necessarily change within generational groups, beliefs are phased out as older groups die.

Changing attitudes

"The attitudes of an individual probably aren't going to change drastically from age 70 to 80, but the cohort replacing this cohort has the most progressive attitude toward gender and sex that we've ever seen," adds O'Shea. "There's never been a 'normal' with regards to sex being binary, there's been a scientific and societal misinterpretation that is now being unpacked and better understood."

But, just as feminism has raised the hackles of some, and others refuse to embrace the concept of same-sex relationships, non-binary gender identity is not without its opponents. As with any recalibration of societal norms, there are those debating gender identity – even among the progressives. Within the feminist movement, a sub-group of 'Terfs' – trans-exclusionary radical feminists – argue that trans women aren't real women.

Emily Porter-Salmon, associate director at cultural insight agency Sign Salad, explains: "There are extents to which



One in eight trans employees (12%) have been physically attacked by a colleague or customer in the past year, and half of trans people (51%) have hidden their identity at work for fear of discrimination, according to YouGov research among trans and non-binary people in the UK.

Source: Stonewall's *LGBT in Britain – Trans Report*.

More than half (56%) of Generation Z in the US know someone who uses non-gender-binary terms. Only 44% of Gen Z said they always bought clothes designed for their own gender, compared with 54% of millennials. They also felt strongly that public spaces should have gender neutral bathrooms, with 70% of Gen Zs supporting the move, compared with 57% of 21- to 34-year-olds.

Source: JWT Intelligence

Overall, 69% of the GB adult population supports LGBT+ rights, and 36% said they would feel positively toward a company that introduced policies/ services to support their LGBT+ customers. In total, 34% would feel positively towards a company that introduced policies to support their LGBT+ colleagues.

Source: YouGov's *Beyond Pride* research

traditional second-wave feminism is actually quite antagonistic towards more early 21st century dialogue around gender, and I think the Gen Z perspective on gender is much less essentialist than the more traditional feminist view.

“They are both important to look at, but there’s a big generational shift in the feminist discourse from the 1970s into the late 20th century and where Gen Z is, because there’s a link for second/ third-wave feminism in the 1970s to sex and a physical form of a body. Gender is not the same as sex; for Gen Z and for millennials, to a greater or lesser extent, it’s about performative behaviour, and how you choose to present – not about a body being a genotype that expresses as a particular shape.”

So, how do market researchers acclimatise to the changing perspectives on gender and ensure they are interviewing and questioning appropriately?

The Market Research Society (MRS) issued a Guidance Note on Collecting Data on Sex and Gender, and in it reiterates the MRS Code of Conduct, which states it is important ‘to allow participants to express their views in the way that they prefer’. Under Rule 33c: “Members must take reasonable steps to ensure participants are able to give information in a way that reflects the view they want to express.

“In particular, the categories provided for completion must facilitate and recognise the fluidity of gender identity, by offering an additional option, such as free-field ‘other’.”

Gender options

But for many, including ‘other’ as an option after ‘male’ and ‘female’ is not enough. In 2014, Facebook gave its UK users 71 different gender options after successfully introducing it in the US.

Others have gone for less prescribed categories. For example, the Government Digital Service offers ‘Male’, ‘Female’, ‘Unspecified’ as its three box options while LGBTQ+ campaigning group Stonewall offers: ‘Female’, ‘Male’, ‘Prefer not to say’, ‘Prefer to self describe as’... with the latter completed by the respondent in their own words.



“There’s never been a ‘normal’ with regards to sex being binary, there’s been a scientific and societal misinterpretation that is now being unpacked”

Ultimately, any form of market research should aim to ensure participants feel included, as then, hopefully, they will be more honest and open in the way they respond.

If people don’t feel valued from the very start of a survey or questionnaire, then how can that research garner valuable or effective data? This is as vital for brands as it is for those involved in social policy or charity research.

The exact numbers actively identifying outside of the binary choices are not known – the Office for National Statistics doesn’t currently collect stats on gender beyond male and female, although it is

currently testing how to update this. But one US study by The Williams Institute in 2016 suggested that 0.6% of US adults identified as transgender, with some states considerably higher.

J Walker Smith, chief knowledge officer, brand & marketing at Kantar Consulting, argues that market researchers must update their methods to reflect both fixed and fluid gender identity. “This is easily done, but it does require a different battery of questions and metrics.”

He points out that we can only see what we measure – if answers are constrained by categories, then to some degree the insight gained will be artificial or incomplete.

Some brands appear to be starting to understand the shifting nature of gender. A select few companies are mentioned repeatedly – John Lewis for its gender-neutral children’s clothing and Coca-Cola for its Super Bowl ad, which used gender neutral pronouns in a subtle way that remained in keeping with its familiar optimistic and upbeat brand message.

“When market researchers have the tools, or start connecting the tools, to gain meaningful data about gender and its fluidity, we’ll be able to feed those insights back to brands and hopefully give them the means to make those changes,” says Balasubramanian. “We, as researchers,

have a responsibility to be true to the data that we gather and, even if it is a minority, take that back to the client, so they can make informed decisions.”

This raises broader questions about what data needs to be collected in the first place.

Inclusion and research

“Often, the business need for data and for researchers to supply it is slightly incongruous with doing this research in an inclusive way,” says O’Shea.

“If you want to carry out a study with a large number of participants and offer the opportunity for greater specificity in how they identify themselves, you could

theoretically not have large enough participant groups – when making considerations for gender – to create statistically significant results, or to use the results practically. But should people’s gender identity or expression be subservient to the practice of research? It’s a question that the industry needs to answer, and possibly accept an answer it doesn’t like.”

In addition, it may not just be how people identify themselves in terms of gender that’s relevant, but who they identify with. In a more gender-fluid society, the predetermined silos of boys’ toys and girls’ stuff may be breaking down.

Take, for instance, a makeup brand that wanted to reach an 18- to 25-year-old female demographic. Porter-Salmon cites a recent Maybelline example.

“Manny Mua is the first man to star in a Maybelline campaign – he’s a man, he identifies as male, but he does these amazing full faces of makeup – females see his influence as equal to a genetic female. Maybelline is saying this is a community of interest, this is about people who love makeup.

“So, for market research moving forward – and thinking about how it has depended on very clear definitions of a consumer, and demarcations by income, social class or ethnicity – those boundaries are being broken down. It’s not about a label that’s applied from the outside to an individual, but about how the individual chooses to present and self-identify.”

Gender identity is going through a massive cultural shift, and those who haven’t grown up with it must now navigate the new lexicon in a similar fashion to previous generations with ethnicity or same-sex relationships.

“If you think about the blunt instrument that race was even 10 years ago, and where we are now, that’s where gender is headed,” adds Porter-Salmon.

Smith is optimistic that market researchers and brands will get there. “Marketers will figure this out. They are in the business of finding ways to connect with people, so deliberately ignoring something like identity is simply not how marketers operate.”



Market performer

Thanks to a successful turn on *Dragons' Den*, Levi Roots expanded his Reggae Reggae Sauce into the mainstream. Jane Simms talks to him about brand extensions, adapting to conventional tastes and staying true to his core consumers

Levi Roots is quite tricky to interview. He's engaging, interesting, amusing – and even the reggae music thumping out in his Caribbean 'rasta'raunt' in London's Westfield shopping centre isn't a problem. But our conversation is constantly interrupted by diners saying hello, praising the food or the atmosphere, shaking his hand, and asking for selfies. He obliges each time, scarcely missing a beat – because, despite the runaway success of his Reggae Reggae Sauce, Roots is, above all, a performer.

He spent 30 years in the music business, touring the world with stars such as James Brown and Black Uhuru, and was nominated for a MOBO award in 1998, for his *Free Your Mind* album. He also used to play Sunday football with Bob Marley in Battersea Park – and one of the defining moments of his life was singing *Happy Birthday* to Nelson Mandela when he came to Brixton in 1994.

Roots' life story belongs firmly in the 'poor boy made good' canon. He is the youngest of five children, who – at the age of 11 – left Clarendon, Jamaica, and the cocooning care of his grandmother (who taught him to cook), to join his parents and siblings in London. Once there, he felt rejected by his father, got into music, got into trouble, got into Rastafarianism, got into cooking – and then, famously, got onto the BBC TV programme *Dragons' Den*. There, he gave a performance that changed his life overnight.

It was 2007, and Roots – helped by his children – had been making and bottling his jerk spice barbecue sauce in his Brixton kitchen for 16 years. He sold it at Brixton market, the Notting Hill Carnival and small local outlets, including record shops, but knew there was a bigger market. When he sought funds to expand his manufacturing and distribution capacity, however, he was spurned repeatedly by banks and other investors, who judged the product to be 'too black', according to Roots.

He refused to compromise the authenticity of the brand and made a virtue of it on *Dragons' Den* (he'd been spotted in Brixton market by a BBC researcher, who suggested he apply to go on the show). Roots ascended the *Den*'s staircase singing and strumming

his now famous *Reggae Reggae Sauce* song, and was pitch perfect – in every sense. His song captured the very essence of the Levi Roots brand, encapsulated in its end-line, 'Put some music in your food'.

"I was rubbish on *Dragons' Den*," he says, admitting he can't watch it again. He clearly wasn't: yes, he cocked up the figures ("I totally started to fall apart at that point"), but by then he'd made his mark. Peter Jones and Richard Farleigh committed the £50,000 he was seeking in exchange for 40% of the business. But while Farleigh was in it for the money – he made a 700% profit on his 20% stake when Roots bought it back 18 months later – Jones saw the potential of 'brand Levi'. "Peter got it," says Roots. "He bought into the whole package. He liked the sauce, but he liked me more. The others just saw the sauce."

Flying off the shelf

Within a month, the sauce had a nationwide listing in Sainsbury's, and sales exceeded the retailer's expectations of 50,000 bottles a year, flying off the shelf at a rate of 40,000-50,000 a week and rapidly outselling Heinz Tomato Ketchup. The brand now spans a range of grocery categories, from sauces to snacks to soft drinks, and there are more than 50 products in the portfolio.

Roots has written cookery books, had his own TV cookery series, and now has a BBC Radio 2 music show. He's accumulated an estimated net worth of more than £35m, and star status. "If a black Rastaman from Brixton can make it, anybody can," he says, marvelling at how far he's come.

An ambassador for The Prince's Trust, Roots is invited to Buckingham Palace every year to address young people being presented with their Duke of Edinburgh Gold awards. "I walk through those gates, and everyone knows me – all the ushers, everyone," he says.

The embarrassment over the numbers on *Dragons' Den* – he claimed he had an order for 2.5m litres of sauce, when it was actually 2,500 litres – taught him a valuable lesson. "You have to be the best of you, which means focusing on the part that you're good



In a difficult market for UK restaurants, Roots is being extremely conservative with his expansion plans

at,” he says. “I’m good at music, and at making, marketing and selling the sauce. I dress well and I speak well.”

He’s surrounded himself with a team of experts to look after the rest. “I have one of the most fantastic accountants, and lawyers, who have taken care of the business almost since day one.”

His lawyer, Teja Picton Howell, proved invaluable 18 months in, when Roots had to defend a claim by a former friend and colleague that he’d stolen the sauce recipe. He won the case, but it lasted “two terrible years”, splitting his community and friends. Jones and AB World Foods, the manufacturer of his sauce, stuck by him, however – as did his supermarket customers and consumers.

“I should have expected it,” he admits. “Teja warned me that people might take advantage. This guy was lurking in the background and I thought he would be fine; he’d been a friend for a long time, had a successful takeaway business in Brixton...”

As well as learning to pay more attention to his lawyer, Roots realised he needed new friends. While he’d never turn his back on his roots, he has had to adapt his lifestyle. “I used to try to be just Levi, the guy who could have a pint with the lads in Brixton and be cool. It took me a while to realise I couldn’t do that any more.”

It’s the reason his restaurant is in Westfield, not Brixton. He’s had to make other compromises, too. The perception among mainstream consumers that Caribbean food is very spicy puts

● **“I had to change to appeal to the mainstream. The question is how much you are willing to sell yourself without selling yourself out”** ●

them off eating and cooking it, Roots explains. So he’s had to ‘reinvent’ traditional Caribbean dishes – both in his cookery books and his rasta’raunt – to make them more ‘accessible’.

He’s also broadened the appeal by featuring pork in recipes – Rastafarians don’t eat pork – and has changed the names of some dishes; the traditional Caribbean dish ‘curry goat’, for example, has been transposed into ‘goat curry’ on his menus.

“I get ribbed for it, especially by the hard-core Rastas,” he says. “But I had to change my style to appeal to the mainstream. I can’t afford to be too precious. The question is how much you are willing to sell yourself without selling yourself out.”

Roots remains loyal to his original core consumers – the 16- to 30-year-olds who “have been driving the sauce ever since I started this.” He gives regular talks at schools, universities and prisons – he served time more than once in his youth for being “in the wrong place at the wrong time” – and is acutely conscious of his responsibility as a role model.

“Whatever move I make, I always have this age group in mind,” he says, wary of going too corporate. “I don’t think they want to see me go ‘whoosh’ and buy up the whole thing like an idiot.”

Priceless mentoring

Roots’ values guide him, but he acknowledges the enormous influence of his mentor, Peter Jones, who has acted as a lodestar from the get-go. While others who inspired him, like Nelson

many, only that Birmingham is (all being well) next on the list. “We should be on that ride right now, but this is proving the worst time for restaurants for 20-30 years,” Roots says. The Gaucho chain collapsed in July, putting 1,500 jobs at risk, while Prezzo, Jamie’s Italian, Byron and Carluccio’s have all announced plans to close some outlets this year. “We’re lucky we didn’t go on a mad expansion, because that’s been the downfall of many of them,” he adds.

Home potential

Roots had the US in his sights in 2011, when he wrote the book *You Can Get It If You Really Want*, a combination of memoir and guidance to other budding entrepreneurs, but overseas expansion is no longer on the agenda: “The UK market is much bigger than we thought.”

He admits he “wafted along on the US dream” for a while, but realised he had underestimated the potential of the supermarkets – and opportunities in food service and in licensing – at home.

Because *Dragons’ Den* catapulted Roots into the spotlight, it’s easy to forget how much work he had done to develop the brand before then. He had a fully formed business plan and marketing strategy, and a strong local following. “Record shops were selling more sauce than music,” he recalls – and he thinks he would have got to where he is today without the dragons, “but more slowly”.

His plan was founded on thorough market research. “I literally tramped the streets of London, and my kids were doing the same in ‘the shires,’” he recalls. “You have to get out in the marketplace and get to know every inch of the terrain, however large or small your company is, and however big or little your plans are.”

Roots spent a lot of time in Brixton market, testing out his sauce on the stallholders. “I’ve always said ‘tell me if something’s not right, but tell everybody else if something is right,’” he says. His research led him to another business adviser, Nadia Jones, who encouraged him to find out how the wider food industry worked by networking at trade shows and exhibitions.

Mandela and Bob Marley, metaphorically “promised me the money,” Jones “gave me the f***ing money,” he jokes. Important though the cash was, however, Jones’ mentorship and contacts have been priceless.

It was he who made the call to Sainsbury’s boss Justin King that secured the first listing; who introduced Roots to AB World Foods, a division of Associated British Foods, and who helped secure licensing agreements with brands including Birds Eye, Subway, JD Wetherspoon, KFC, Domino’s Pizza and Slug & Lettuce. It was also Jones who curbed Roots’ enthusiasm to rush ahead too fast.

“If I’d not had Peter to help me steer the ship, I’d probably have made a fool of the brand a long time ago,” he admits. No doubt, Jones’ influence curbed Roots’ ambitions in two key areas: restaurants and the US.

He opened the Levi Roots Caribbean Smokehouse in Westfield in December 2015. Restaurants are a difficult market, but he “de-risked it” by doing it in partnership with Eren Ali, co-founder of Las Iguanas. Westfield is supposed to be the blueprint for other restaurants – he won’t say how





Levi Roots' life (and name) were changed after a transformative spell in prison

These days, he's able to tap into the research resources of the big brands with which his business "is lucky enough" to work. But he's still involved in product development: "No-one knows Caribbean food like I do," he says.

Roots talks a lot about luck – and his success has come about, at least partly, because of being in the right place at the right time. But you make your own luck, and putting himself about, as he has always done and still does, inevitably throws him in the path of people who can help. Even prison proved "the right place" to some extent; it was there that he encountered a volunteer drama teacher who inspired his love of Shakespeare and encouraged him to read Mandela's *Long Walk to Freedom*. "She changed my life completely," he says, explaining that, in prison, he shucked off his alter ego, Keith Valentine Graham (his birth name), to become his better self, Levi Roots.

Roots, effectively, is the Levi Roots brand, so what would happen to the business if he fell under the proverbial bus – or, as he prefers to think of it, retired to Jamaica and sat on the beach all day drinking rum punch?

● **"One of my key messages is that there's no such thing as mistakes; it's all about 'feedback'"** ●

For now, his enthusiasm, energy and enjoyment seem undiminished. He's constantly listening and learning, and takes every opportunity to share his experience with others. "One of my key messages is that there's no such thing as mistakes," he says. "It's all about 'feedback.'"

Roots is tickled pink by his success and the means it has provided to look after his family – including his eight children and his mother – and to indulge his weakness for Ozwald Boateng suits and silver jewellery. But you sense he's also still basking in the feeling of vindication that *Dragons' Den* conferred on him.

"My dad didn't believe in anything I did, while my mum believed in everything about me," he says. "So I showed my dad – but the happiest feeling was to repay my mum's faith in me. That felt like such a release, after many years of failure."

But you weren't really failing, Levi, were you? "No," he laughs; "I was 'preparing.'"

"People seem to think the food tastes better in the restaurant when I'm here," he laughs – but doesn't offer much clue as to how it might reduce its dependence on him.

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The meeting of human and machine

Artificial intelligence is increasingly used in the process end of market research, leading to horror stories of job losses. Rather than focusing on the fear, however, the industry can embrace the benefits, while honing the skills required to manage and interpret AI.

By Tim Phillips

In August 2018, Andy Haldane, chief economist of the Bank of England, warned that artificial intelligence (AI) would make many of our jobs redundant. He speculated that the changes in the job market could be worse even than during the Industrial Revolution, causing mass redundancies in white-collar jobs.

“This is the dark side of technological revolutions, and that dark side has always been there,” Haldane said. “That hollowing out is going to be, potentially, on a much greater scale in the future, when we have machines... replacing the cognitive and the technical skills of humans.”

As always when redundancies are announced, our first thought is: what happens to my job?

In 2016, Carl Benedikt Frey and Michael Osborne, of the University of Oxford, ranked all 702 statistically recorded occupations in order of the probability that they will be automated away. Ironically, they did this by training an AI to recognise the sort of activities that will be profitable for the machines to do, and to work out how much of each job is made up of those activities.

In their estimation, market research is going to change dramatically in the next few years. The probability that a job in research will disappear is well above average: 61%. This means research jobs are much more under threat than those of fashion designers, who have less than 1% chance of being replaced, but much less so than those of fashion models, whom Frey and Osborne predict have a 98% chance of being replaced.

Semi-skilled tasks

Research jobs are not, of course, homogenous. Frey explains that it’s not the job title that gets automated, but the activity. The jobs that will survive, he says, are “likely to be intensive in creativity, in complex social interactions... things that computers are still relatively bad at”.

Probably not all – or perhaps not even most – of the early impact of AI on research will be to create machines to do high-level analytical thinking. Optimising existing business processes can deliver significant benefits. Consider robotic process automation, or RPA, which is already using AI to automate semi-skilled office tasks.

Forrester Research predicts that the global RPA market, worth \$250m in 2016, will grow to \$2.9bn by



● **“Research jobs are much more under threat than those of fashion designers, but much less so than those of fashion models”** ●

2021. Essentially, a company installs software that looks out for repeated administrative processes – for example, processing forms – and takes them over, working like an advanced version of an Excel macro.

The AI component then gradually optimises and standardises the process across the organisation. “It’s not just high-volume, low-complexity work. Look at inefficient office-based activity... it might also be people carrying out complex tasks that consume a huge amount of time and are quite prone to error,” says Terry Walby, CEO of thoughtonomy, one of the largest RPA vendors.

RPA’s early successes have been in process-intensive sectors such as financial services, but it can be trained in any environment. Walby argues that any organisation that employs people to do repetitive clerical work can increase productivity by using AI.

Pippa Bailey, head of innovation at Ipsos Mori, says: “There are quick wins from AI in terms of automation and making some processes faster – sometimes things

that have nothing to do with the research data. One of our offices uses AI for organising its office space.”

Quick wins

Lewis Reeves, CEO of Viga, says we should not underestimate the capabilities of AI to improve employee creativity and productivity on existing services. “We need to spend more time on the areas that have the most value,” he says. “Any tasks that don’t need to be done, we can pass to machine learning.”

Because so much of Viga’s survey work has been customised, it is not suitable for basic automation, but AI-driven standardisation is a focus for Viga. Reeves has found some quick wins by training an AI on its database of past surveys. “We have asked respondents 250m questions in the past couple of years, so we are working on predictive question building.”

This is one area in which human involvement has sometimes led to sub-optimal outcomes, he says. Viga’s clients may not want a fully automated solution, and prefer to create carefully structured, custom research. While experienced survey compilers may

What is artificial intelligence?

In 1945, Vannevar Bush, who had headed the US Office of Scientific Research and Development, wrote an article for *Atlantic Monthly* called ‘As We May Think’. At a time when even the existence of what would become the computer was still a state secret, he speculated on a machine that would soon aggregate “the associated opinions and decisions of [our] whole experience”, to help us make decisions. In 1956, the first academic conference on the subject was held, where the name ‘artificial intelligence’ was coined. Then, as now, however, the participants struggled to define what this was, and AI today covers many applications.

AI – as applied to the problems in which a researcher would be interested – is an expert system with three components: a database; a way to interpret that data and make inferences from it; and a means of communicating its insights to the outside world.

These insights can have two forms. Decision support offers options and issues to human decision-makers, usually with some expression of their likelihood. Decision-making goes beyond a human level of knowledge and experience, and is at the heart of automation.

The inference engine at the heart of an AI uses algorithms – sets of rules that define a computation. These algorithms are the product of machine learning, which has used some way of associating the data to create rules and processes, rather than having them completely defined by a human. This can be continuous, ideally improving the algorithm over time, either with or without human intervention.

Today, all AIs are task-specific – a general AI is still the elusive goal. Dr Abdalla Kablan, CEO of AI specialist Hippo Data, calls them ‘Einsteins’ – while they can be trained to trade stocks or translate Japanese, we have yet to create an AI that, when shown a kitchen, can make a cup of tea.



target questions effectively in their area, slight differences in phrasing or scales mean that responses may not be easy to compare over time or across regions. So a simple, expert system that guides whoever creates the survey to use standardised phrasing and structure leads to value for clients.

“AI will not always be about creating new avenues of research,” Reeves says. “These techniques give us greater power by bringing together more datasets for comparison.”

We must also resist the temptation to give too much power to AI in research, argues Ryan Howard, head of analytics at Simpson Carpenter – not because we’re Luddites, but because that’s a bad way to use the technology. He warns that one of the most important roles for people will be to ensure that using machine learning does not become an aimless process of mining data that wastes time on spurious correlations in the sample data.

“We have got to be as rigorous with machine learning as we are with more traditional analyses. If not, machine learning arrives at the wrong answer, just more quickly,” he says.

Howard identifies three tasks for an analyst working with research data in this world. The first is to understand the algorithms intimately, because then they can also understand how the AI will respond to inconsistencies in the data.

The second is to apply “our domain knowledge” – to investigate only the sorts of questions that are sensible, or that might benefit the client. AI can find

Defining the moral boundaries

Because AI has to learn from data, this creates an ethical problem: what if the data is biased or incomplete? By the principle of ‘garbage in, garbage out’, it is likely to make bad decisions. If these are pricing recommendations, for example, then perhaps it’s no big deal, and it can safely learn from its mistakes.

As a member of the Esomar ethics committee, Jon Puleston, Lightspeed’s vice-president of innovation, has been discussing the implications of this. “The moral boundaries of marketing and research were quite clear in the era when a researcher was advising a marketer what newspaper to advertise in, or what car men over 50 like to drive,” he says.

“We now have the capabilities, with AI, to microtarget, not just by demographic, but by personality type and with highly customised pieces of communication and marketing strategies – which raises all sorts of potential ethical issues. AI decision-making algorithms can become discriminatory without careful consideration of how decisions are made, and it is difficult to bake human ethics into an algorithm.

Hetan Shah, executive director of the Royal Statistical Society, explains: “Let’s say you’ve got a recruitment algorithm and it has been trained using the data of all the people you’ve hired that you thought were good. Then, if your algorithm starts

recruiting lots of old, white men, you have a problem.”

There are several initiatives to try to set up ethical frameworks, with inquiries currently by both houses of Parliament into how these might work. For decision support, it will be possible to continue to impose rules: for example, making price discrimination based on race illegal. For automatic decision-making, however, this is more complex and subtle. An AI can’t tell you why it is making a decision, so this probably implies that AIs will need to be regularly tested. Defining those tests – who would administer them, and what to do about the outcomes – will be a hard problem to solve.



interesting and complex patterns in data that may tell us something about the world, but which may also distract from the business problem.

The final caution is to test and validate conclusions to guard against overfitting. This is common in machine learning: the AI creates a complex relationship between all the data points that fits the sample data extremely well – but some of those relationships are just noise, not signal. This means it is a bad model of underlying patterns, and so has little predictive power.

Adding value

Rather than remove the need for expertise, Howard says, AI makes it even more important, because the researchers have to use the first phase of number-crunching to formulate some hypothesis – one that is both testable in the data

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“AI can find patterns in data that may tell us something about the world, but which may also distract from the business problem”
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and useful to the client.

“That’s how we move from just code that predicts an answer to being a consultant, adding value to business,” he adds.

Constant communication with the client is vital, Bailey adds. Because machines that learn can only do so with fresh data, it’s important there is a shared understanding that all conclusions are contingent on a cycle of testing and refining, that all predictions have some margin of error, and that it’s a joint project to reduce it over time.

As a result of the hype around big data, many clients listen more to their data scientists, and AI extends that trend. Kyle Findley, director of data science

innovations for Kantar Insights, has helped develop products such as the ConversionModel – a measure of brand equity – and FutureView, a measure of

consumer early adoption and in-market influence. He believes that AI emphasises how important the researcher’s view is for the client, because the researcher can bridge data science and what it means in terms of a real-world brief.

“There has been an influx of data, and methodologies and techniques, most from a non-market research background – from tech companies or, at best, digital marketing companies,” Findley says.

“As market researchers, when we have not had those abilities ourselves, we have relied on these companies to supply them. But they do not have the same paradigm in their heads that we’ve cultivated with our clients over decades.

“A lot of those companies and suppliers describe the way that consumers think and speak. We have to fill the gaps, translating that into research insight for our clients – which often relies on higher-order concepts. Anyone can deliver sentiment in social media, but the client question is, what are the emotions that I am tapping into, the basic human needs that I’m fulfilling?”

Rosie Hawkins, global director of client solutions for Kantar TNS, says: “We have always needed people skills, but given that we are now starting with massive amounts of unstructured data, we need absolute clarity on what the client needs to get out of it.”

This will boost qualitative research, Hawkins argues. Remember that Frey and Osborne’s research found that the most secure jobs after automation will be those that require creative, imaginative or interpretative skills. AI, Hawkins says, increases the value of some of the researchers who we would often consider to be under threat.

Fast feedback

AI, nevertheless, has advantages that existing techniques cannot match. One of the most important is to create fast feedback on what doesn’t work.

Scott Young is the European CEO of PRS In Vivo. His company works mostly with FMCG brands and has created the AI Pack Screening Model, which uses AI based on its experience to predict which packaging designs work best.

“We see many new products that fail in the market, and a lot of our evidence suggests it’s because of packaging not breaking through clutter and communicating the key proposition clearly,” he says. This packaging has been researched, but Young argues that marketers are increasingly forced to cut corners, and are putting too much resource into bad ideas. “They are using ‘judgement’,” he jokes. “This may involve very cheap and sub-optimal research. It can mean




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AI takes longer than you think

One of the insights that AI has given us is just how difficult many ‘intelligence’ problems are to solve. While AIs in narrow, rules-based systems – for example, for playing chess – have been successful, AI research has taught us how complex human communication is. Recent chatbot and machine-translation breakthroughs, for example, are the result of half a century of research:

- 1950:** Alan Turing creates the ‘Turing Test’ for AI. If a machine can trick 30% of humans into thinking it is a human being in five minutes of conversation, we can call it intelligent.
- 1954:** IBM demonstrates machine translation from Russian to English. But the system has only 250 words, and is focused on chemistry.
- 1964:** The first chatbot, called Eliza, is created at MIT.
- 1966:** The US ALPAC committee publishes a report for the US government that concludes machine translation is more expensive, less accurate and slower than human translation.
- 1970:** AI pioneer Marvin Minsky tells *Life* magazine that the problem is almost solved: “From three to eight years, we will have a machine with the general intelligence of an average human being.”
- 1997:** Systran, after 29 years of development, launches Babel Fish, the first online translation engine.
- 2011:** Google Brain launches, and rapidly improves translation accuracy by 2016.
- 2014:** Eugene Goostman controversially passes the Turing Test. Critics point out that it is a chatbot posing as a 13-year-old Ukrainian boy with limited English.
- 2016:** Microsoft’s Tay chatbot is released on social media. It quickly learns to make offensive racist remarks.

marketers sitting in a room, looking at 10 designs and picking the three they like, or using automated tools that show the product out of context, or doing a very quick online survey.”

When PRS In Vivo looked at the outcomes from packaging changes, it discovered that those surveys missed some potential problems – most often, how a product would stand out on the shelf – and didn’t pick up emerging trends. So it trained an AI on its database of designs, coupled with data of their post-launch success. “That allowed us to create the beginnings of a predictive model,” he says. “A way of looking at new designs that we know corresponds to

how we do studies with shoppers and the metrics that link most to market success.”

Supplement not substitute

AI, again, is only part of the creative process. Young does not plan to use the tool with his clients to replace product testing. Instead, it will force them to look at new ideas in a consistent manner – basically, to tell them which ideas to throw out, so they can put all testing and development resources into ideas that have a better chance of succeeding.

“It’s a supplement to a human process, rather than a substitute,” Young says. “That’s why we call it AI

screening. We can’t put a design into a system so it can spit out a sales number. We are not there yet – nor do we necessarily think you are ever going to get there.”

While most AI in research emphasises its limitations, it is important to recognise the biases and myopia of human intuition, and to use AI to save us from ourselves. The marketers and respondents who make poor packaging choices are trying, and failing, to make a good decision. In future, knowing where to draw the line – so that we get the best of the AI and the best of the human in drawing inferences – will be an essential research skill.

Co-founder of Pulsar, Francesco D’Orazio, was employing deep-learning AI tools to create insight earlier than most researchers. Pulsar Vision, the first market research AI tool to make sense of images on social media, was launched in December 2015. Six months later, Pulsar introduced Pulsar Modules – a suite of horizontal tools that clients can use to spot emotion, or do text extraction or image tagging in different types of (predominantly social) data.

One of the things that D’Orazio’s team has learned is the potential of targeted tools – what it calls ‘vertical AI’. New modules, launched at the beginning of September, focus on food, travel, apparel, colour, logo detection, celebrity, video analysis and demographics, with algorithms trained to spot these aspects of visual data more precisely.

D’Orazio explains that research questions are often highly specific, so tools should reflect that focus.

“We are working with a food-industry client now, looking at 15,000 vegan meals on Instagram. Whenever someone posts something about a vegan brunch or vegan dinner, we compile the list of ingredients that we have recognised. Our aim is to come up with recipes for the best vegan three-course meal, based on what people like the most.”

A standard, horizontal image-recognition AI module would produce many image tags – such as plate or glass – that tell the researcher nothing of interest. The more focused food AI module picked up 200 ingredients and dishes, which, after eliminating a few false positives, created a list of popular ingredients (intuition would have misled many of us: avocado came in tenth, and chocolate was used in 36% of the dishes).

Identifying patterns

D’Orazio explains: “I’m also working with a retailer to understand the perfect festival look. So, take 100,000 images of people going to festivals in the UK,



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“Knowing where to draw the line – so we get the best of the AI and the best of the human in drawing inferences – will be an essential skill”
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identify the items they are wearing in those pictures, and quantitatively put together the look that is most common or receiving the best comments, or the most engagements, based on how people react to them.”

For this type of research, however, do we know that techniques using 100,000 images will do better than an ethnographer with 100? D’Orazio, trained in ethnographic research himself, is trying to find out. Pulsar is working with Manchester University’s School of Arts on the differences between pattern recognition in humans and machines, and sponsoring a PhD on this subject, starting in 2019.

“We have built something that allows you to scale up that approach on a quantitative basis,” he says. “As humans, we are good at identifying patterns, but, sometimes, our appetite for spotting those patterns can be misleading because we want to reduce complexity – and, sometimes, we reduce it at the expense of the important information.”

Even the most powerful AI needs a researcher to help interpret the world. “We’re the ones that populate the hypothesis. We define the lens that we use to look at the data,” says D’Orazio.

“The biggest challenge is getting out of the ‘big data’ paradigm that we’ve been sold for the past 10 or 15 years. It says that the more data you have, the more interesting the ideas that emerge from that data. That is not true. That is just not what happens.”

Building smart technologies

AI within market research is more frequently discussed than it is executed, and is very much in its infancy. While cutting-edge tech is evolving constantly, AI’s application is still limited and many are also talking about its uses incorrectly.

However, from identifying or profiling through AI, to creating more interactive survey experiences and enhancing real-time results, the potential for AI is clear to see. I founded Viga two years ago, based on our proprietary tech, and we’ve developed this ever since. It underpins the speed, relevancy and cost-effectiveness of our delivery, but we value human-to-human interaction above all else. Key for us is building smart techniques into our processes, but ensuring there’s always a human and machine combination.

The crucial question for us is how to power AI in a model that has a human at the end. AI should make laborious tasks disappear, allowing people to offer context and nuance – things that are missed when you fully automate. Tech shouldn’t dilute the value, but augment it by making processes more efficient.

It’s very important to distinguish between

automation and true AI. At Viga, we asked 500m questions last year – these were enabled by AI. If we were merely making use of automation, this figure would look closer to 10 surveys asked multiple times.

Our use of AI involves generating content, not pre-populating – for example, use of predictive question text. Just as your smartphone can predict the next word you’ll use, even if you’ve never written the sentence before, AI can predict the next question needed before it has been written. It may not be the sexiest function, but if it frees humans up from building questions, so they can have more time on the key elements of interface and interaction, it’s integral.

Our clients shouldn’t be left to interact with a machine. Tech is there for the hygiene elements; however, there’s always a person at the end of the line on a Sunday evening before a big Monday morning presentation, to ensure there’s never a ‘computer says no’ moment.

● Lewis Reeves, CEO, Viga



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Data *Driven*

Fighting the fake

The Economist has been printed for 175 years, but lots is changing – from the wider political climate to the way people read their news, as its chief marketing officer, Mark Cripps, explains to *Ben Bold*



“Thank you, Mr Trump!” jokes Mark Cripps, *The Economist*’s chief marketing officer. At a time when the US president is under growing scrutiny over his relationship with Russia’s Vladimir Putin, the subject of several White House exposés, and raising eyebrows with his excruciatingly awkward behaviour during his UK visit, it’s perhaps a strange thing to say.

But Cripps makes a serious point. In this era of ‘fake news’ (whether that’s genuinely fake reporting or the term that Donald Trump applies to any news brand that criticises him), there is

a rapacious appetite for quality journalism – and few publications are as reputable as *The Economist*, now in its 175th year.

“He’s done us really well,” Cripps says. “There are definite spikes related to the news agenda, from the UK elections, Brexit or Trump’s presidency... all have spiked traffic to our content, and even driven newsstand sales.” During Trump’s first 100 days in office, for instance, new subscriptions from digital channels grew 12% in North America year on year, and 15% globally.

Cripps’ words are also borne out by the

research that found 62% of prospects cite trustworthiness as the main criteria for subscribing.

“A few years ago in China, for a dollar or something, you could get a complete copy of *The Economist* scanned in as a PDF. Now even people used to that kind of behaviour are starting to want to pay for legitimate sources.”

From direct to digital

Cripps is not a client by background. He has 25-30 years’ experience working at agencies, including McCann, with a “few dabbings into client marketing”. He joined the publisher full-time in 2013, as global head of marketing innovation and acquisition, and was promoted to executive vice-president of brand and digital marketing in 2015, before taking up his current role as CMO in April this year.

He was originally in direct marketing – a discipline once viewed as the inferior sibling of brand advertising, but which “morphed into digital”. “I’d always worked for direct marketing or direct response agencies and, within that, I specialised in technology clients,” Cripps recalls. “Then these @ symbols and dotcom things started happening and it became natural to get involved in digital, and – as a direct-response medium – that bloomed into branding and community.”

It was not always an easy transition, however. “I had huge arguments with

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“We think people want to pay for quality content – content that is truthful, not fake”
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latest ABC figures for the UK; between July and December 2017, *The Economist*’s circulation grew 7.8% to 254,129, up from 235,670 for the same period in 2016.

For many publications, readers are less willing to pay for a subscription, but that is not the case at *The Economist*, Cripps says. And while it is flourishing in its UK home market, the publication has also seen positive reverses to its fortunes elsewhere.

“We think people want to pay for quality content – content that is truthful, not fake – and we’re even seeing that mindset change in China,” he says, referencing



The Economist’s UK circulation grew by almost 8% between July and December 2017, to 254,129



Addressing the reader profile

Why does *The Economist* have fewer female readers than male ones, with women making up less than 30% of its 1.4m print and digital subscribers? That was the question the publication set out to answer.

Information and analysis experts Ipsos Connect and *The Economist* used semiotic analysis, focus groups and readership surveys targeting male and female current, lapsed and prospective readers. Semiotics helped to analyse communication style and marketing communications, creating insights that influenced the publication's layout,

style and tone of voice.

Coinciding with 2018's International Women's Day, *The Economist* launched a paywall-free array of content, including a series of profiles of inspiring women – such as activist Betty Friedan and architect Zaha Hadid – while its social channels, such as Instagram and Twitter, targeted women.

Readers were also able to download the profiles as a bundle, in exchange for registering online.

The ongoing strategy is addressing the imbalance, with the number of female subscribers growing 0.6% faster than male subscribers.

people around 1998 – ‘this is the future, this is where marketing is heading, it's inevitable,’ he says. ‘Creatives, in particular, were struggling with it. But it was clear where the discipline was going to go. It wasn't helped by the phrase ‘below the line’; that felt dirty, and you'd get the creative or brand agency taking the lead and below-the-line agencies were very much subservient.’

So how does Cripps feel his experience serves him at what is, historically, a print-focused organisation? ‘[It brings] an absolute transparency on the ROI. It's given me that discipline,’ he says.

Structurally complex

The marketing team at *The Economist* is vast – ‘several hundred globally, directly and indirectly’ – and market research and insight do not sit directly below Cripps.

‘Specifically, we're one publisher team now, under [chief operating officer and publisher] Michael Brunt,’ he says. ‘That includes business to business, trade and circulation marketing, and event marketing. Historically, business insight and data sits outside of it. We're a complex matrix organisation; it's not directly into marketing, but it is a service division.’

Even so, Cripps' team ‘very regularly has ongoing research commissioned by the marketing team and it's very clear it's a marketing remit’.

Research-driven publishing

Unsurprisingly, data analysis, market research and insight have played a leading role in *The Economist's* circulation success, with bundles designed to entice new readers.

‘On a regular cycle, I won't say how frequently, we engage pricing consultant Simon Kucher & Partners,’ Cripps says. ‘It tests price elasticity, and the impact of a change in price to volume impact and the subsequent revenue. It also looks at the product bundle types – how to bundle that, how to optimise the step-up strategy from the [12 issues for £12] trial up to full-blown subscription.’

For those prospective readers, *The*

***The Economist* is known for its distinctive and witty adverts – but has to be mindful of different markets**

Economist uses first- and third-party data ‘where permissions are available’. ‘We use second-party data as well,’ he says. ‘We structure it by acquisition and retention.’

The Economist uses a combination of those sources to find lookalikes – lookalike modelling combines different sets of data to find the best prospective customers, who are then targeted.

‘When we communicate, we suppress all subscribers so we're not retargeting them,’ Cripps adds. ‘Then, retention-wise, we track people's consumption of content and engagement, and make sure we use data to get the right content in front of them, at the right time, so they revisit us or

“The more content people get, the more likely they are to subscribe. It's all about the content – that's the value exchange”

engage with more content.”

The Economist's editorial is key to its success, a point backed by research conducted a few years ago by professional services firm PwC, which analysed what makes readers loyal and what attracts new subscribers.

‘Lo and behold, it's all about the



content,” Cripps says. “So we started serving content to prospects and subscribers. The more content they get exposed to, the more likely they are to subscribe. It's all about the content – that's the clear value exchange.”

The Economist employs numerous agencies – including, recently, Ipsos for a project aimed at attracting more female readers (see panel, Addressing the reader profile), and Universal McCann's (UM) insight division, headed by Michael Brown.

“UM Insight, the consumer research team that sits within UM, is one of the newspaper's key global measurement partners,” Brown explains. “The majority of the team's output to *The Economist* has focused on evaluating ad effectiveness and understanding the news marketplace



Do healthy profits mean unhealthy competition?

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Readers are loyal because of *The Economist's* high-quality content – which also helps to attract subscribers

research has told us that the readers really appreciate our wit”, the global nature of its business requires a dose of caution.

“We have to be careful because wit and wordplay don’t resonate in all markets,” he says. “I won’t tell you which ones, but some in Europe are straighter than others. Some don’t understand sardonic wit or super-clever wordplay. Some of those are across the Atlantic.

“The wit is built into our editorial content and it’s our job to make sure the advertising reflects that – but it’s got to work. If the wit is too obscure, you won’t elicit a response necessarily. It’s a fine line. We use research to navigate how much, or how little, we can lean on humour.”

Research is also imperative to *The Economist's* strategy to attract advertisers and brand partners. “We try to manage relationships directly with the brands, and we give CMOs of those brands good insight into our audience profiling and segmentation,” Cripps says.

“We’re organised around a vertical market as well – so we’re very specific to finance, for example, helping the CMOs understand their markets better, and how our audiences and content can address their clients’ needs.

“We track the efficacy and performance of the work that we do for those clients and we have ongoing dipstick research, surveys and panels.”

Emerging tech

Cripps is excited about emergent technology, such as voice, looking at how “it can be used not only for people to interrogate or be more curious, but also to deliver a meaningful audible experience”.

“An easy thought is ‘Wake up with *The Economist*,’” he says. “I’ve got Google Home in my house and, every morning, I say, ‘Hey, Google, play Radio 4 – and it does. But it’d be great to say, ‘Hey, Google, Wake up with *The Economist*, and it briefs me on the top five issues of the day and gets me ready.’ That’s a no-brainer. Where it goes beyond that, I don’t know.”

What Cripps emphatically knows is the role data, market research and insight will play in the company’s future. “Data is at the core of everything we do – so is insight and analysis,” he says. “It is an essential part of our brand make-up.”

and the attitudinal atmosphere around it – no small feat, given the febrile tone, relentless pace and tumultuous nature of the past years’ global news arena.”

Elsewhere, *The Economist* uses a monthly reader panel to gain feedback on various issues. “The response rate is like no other brand I’ve worked on,” says Cripps. “It’s just through the roof.” A recent survey sent to 15,000 panellists was completed by 83% of recipients.

Wit and wordplay

It’s not often that market research and humour are linked, but if *The Economist* is best known for its quality journalism, it is also renowned for its humorous, instantly recognisable print ads. These typically feature a dominant red background, with a witty adage in a white font. Lines such as ‘Trump Donald’ and ‘Would you like to sit next to you at dinner?’ are funny, but make serious points.

Cripps admits that, while “lots of




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Dive in

Swim England has employed many insight techniques – not least behavioural science – to give robust evidence of the value of swimming to all its stakeholders. Rob Gray reports



It feels like an ideal day for a swim. The summer-heatwave sun blazes in the cloudless blue sky and, on the radio, Rob Brydon is wittily regaling listeners about his new film, *Swimming with Men*, a comedy about an all-male synchronised swimming team.

A cooling dip would be lovely, but I'm here in Loughborough to talk about the ins and outs of aquatics, rather than to immerse myself in the water. The person ready to tell me all about deep dives relating to the subject – and how research is used in his organisation, as well as more widely – is Damian Stevenson, insight and partnerships director at Swim England.

Stevenson joined what was then the Amateur Swimming Association (ASA) in September 2014, having forged his research career at the likes of Boots, Nottingham Trent University and energy company E.ON. Next year, the sports governing body will celebrate its 150th anniversary under new branding, introduced in 2017 after extensive internal and external stakeholder consultation, in which Stevenson and his team were heavily involved.

Greater clarity

Why the new name? Partly because of the prosaic need to escape confusion with

that other ASA – the Advertising Standards Authority. The main rationale, however, was to modernise and bring greater clarity to the organisation's offer. Over many decades, the ASA had evolved into a brand trusted and respected by parents for its role in helping children learn to swim – but there's much more to the story.

As the national governing body for aquatics, Swim England faces a wide array of complex challenges and must nurture many relationships with facilities operators, aquatic sports clubs and funding providers.

"Our change in messaging to the wider

sector is, 'how can we add value?'" says Stevenson. "Yes, we have expertise around talent and clubs, and in terms of growing participation – but how do we bring that together for a proposition for the sector?"

When Stevenson arrived at the organisation, swimming participation was in decline after an uplift in the wake of the 2012 London Olympics, and the research function was fairly "reactive" – responding to what people around the business wanted to know. "We had done some schools' research that was very well considered and helped raise the visibility of the importance of schools' swimming. But, for me, there was a disconnect in terms of how we were using the outputs of that and how proactive we were being."

Stevenson was determined to introduce an insight strategy that would transform his team into business partners with a vital role to play in informing, guiding and supporting the decision-making process. What he styles "a considered programme of insight" is intended to underpin the objectives and KPIs of each of Swim England's departments.

"It's woven into the DNA. A lot of people have kindly referred to it as the 'golden thread' within the organisation. Hopefully, I have been able to take us on a journey from having some interesting stats and numbers through to developing business plans, future strategies, and implementing

plans based on good evidence,” he says. Making insight fundamental in this way has led to a broadening of Stevenson’s responsibilities. He now heads a directorate comprising three teams and 19 people. In addition to the four-strong insight team, there is health and wellbeing (more of which later), and strategic partnerships, which focuses on the relationships Swim England has with the leisure industry, spanning local authorities and private sector pool operators.

Stevenson is quick to make the point that Swim England doesn’t own any ‘water space’, which means delivery of the aquatic experience is in the hands of others. So, he argues, external stakeholders must be given with insight of extremely high quality, otherwise the governing body risks fuelling resentment along the lines of – ‘what right have you got to tell me how I should change my business?’

“It’s not just about coming up with insight *per se*, and some good findings, but actually operationalising it – making it relevant for their world and speaking their language,” Stevenson explains.

Inspiring people

Swim England has striven to maximise the impact of its work and inspire people across the sector to listen to its insights by using a variety of approaches. These include behavioural science, co-creation groups, online trackers and blended insights from desk research. A key objective has been getting to grips with ‘what is broken’ with the swimming experience and finding ways to fix it.

At the heart of this is work by The Behavioural Architects, a global insight agency with nudge theory expertise, which was brought in to conduct three projects. The first looked across audiences for behavioural insights to help strengthen the customer experience. The second focused on inclusion, looking at people with physical, hearing and visual impairments, to understand what improvements were needed to boost their attraction to swimming.

Swim England wants to make pools attractive to a broad spectrum of people with differing swimming abilities



“It’s not just about coming up with insight *per se*, and some good findings, but actually operationalising it – making it relevant”

“That was interesting because what we found was this wonderful sense of equality in the water, where people were not necessarily being judged – it was very empowering to them to be part of a social group, or to have that time in the water,” says Stevenson.

The third aspect of the project was understanding 11- to 17-year-olds, and the “very different mindsets in terms of

swimming” of an 11-year-old versus those on the brink of adulthood.

The behavioural research led to the development of a Three Frontiers Model, now being used by local

authorities and pool operators across England to improve customer experience and build growth (see panel, Three Frontiers Toolkit). Undoubtedly, for large swathes of the sector, change is long overdue.

“When we’ve presented the behavioural insights, I’ve had senior people in the industry go, ‘we are 20, 30 years behind the curve on this’. We’re there as the critical friend, holding up the mirror,

saying ‘we need to change this,’” says Stevenson.

The insight team runs around 50 projects a year, about 80% of which it handles in-house. An important piece of ongoing work is the swimming brand tracker, done quarterly by Critical Research, which allows Swim England to keep abreast of participation trends and improve understanding of the Three Frontiers at a national level. The tracker is also used to monitor campaigns – for example, *Finding Dory*-inspired swimming lessons developed with Disney and implemented in almost 450 pools.

Considering the scale of Disney’s insight firepower, compared with the budget at

Three Frontiers Toolkit

The Three Frontiers Model is a framework shaped by behavioural research. Each Frontier – improving the environment, tailoring the offer and increasing the visibility/relevance of swimming – represents an opportunity to grow swimming. Swim England believes that all three must be addressed to truly succeed in attracting newcomers and retaining existing audiences. To help, it has produced a toolkit, accessible from its website, that has three sections:

● Research into national swimming behaviour

National research explaining what customers really want from swimming and the reason behind the Three Frontiers Model

● Guidance documents

Translating research recommendations into practical advice for improving customer experience across each frontier

● Practical resources

Industry case studies, guides and templates for planning and delivering improvements. Resources are listed in each guidance document.

Stevenson says the materials available are “version one”. Work is under way to make the content more user friendly – for example, by using PebblePad/ building video tutorials to bring information to life.

The intention is to positively influence England’s 3,000-plus public pools. Stevenson winces when a local authority says its pools are something it just throws money at. “There is a lot of income, if it’s done right. Even the Learn to Swim elements of the pool programme should be generating as much income as the gym. Swimming shouldn’t be the poor relation.”



Swim England's Parent Survey is a useful tool for influencing government policy

Swim England's disposal, Stevenson says presenting the tracker's findings in a meeting with the entertainment giant was one of the most nerve-wracking moments of his career. Happily, the evaluation married closely with Disney's, vindicating Swim England's approach.

Critical is involved in two other projects – Swim Local and the Parent Survey. The latter is about understanding the parents of two, five, eight and 11-year-olds – what they do in terms of their children's confidence and competence around swimming. "We can see how that builds before, into, and by the end of primary school." The survey findings give valuable ammunition for influencing government policy on swimming and schools.

Swim Local is a major pilot programme by Sport England and Swim England, to test ways of getting people into their local pools. Twelve local authorities are taking part, including Northumberland, which worked with Swim England on customer research into awareness and attitudes among adults to offers at four of its pools.

Customer surveys and focus groups used Swim England market segmentation and the Three Frontiers growth model to elicit responses from 800-plus customers,

which informed interventions spanning: local community awareness; information and addressing common preconceptions; customer environment and experience; pool programme variation; and choice. The project is ongoing, but early results indicate a 7% rise in new customers and increased Net Promoter Scores.

"Among the key benefits of working with Swim England has been its technical advice, attention, and support for our local interpretation of its market segmentation and growth models," says Malcolm Moore, Northumberland Sport senior

"#loveswimming aims to heighten the profile of swimming, rather than relying on the four-yearly boost brought by the Olympic Games"

development manager. "This has helped build confidence and impetus among our project team to progress and start innovative sessions and products based on its original research, and in response to customer insight."

Moore adds that developing hydro-fitness sessions (attracting a younger, 'gym fitness-focused' segment), Aqua Playtime (family focused), Integrated and

Progressive Adult Swim Offer, and Hydro Health (GP referral products) are testing the insight that "preconceptions that swimming pools merely offer 'lanes and lessons' is a main barrier preventing adults choosing or engaging" with pools.

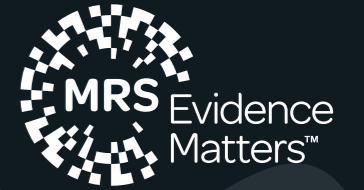
All of this confirms Swim England is moving in the right direction with its insight strategy. Yet, there is still a long way to go and many opportunities to exploit. One is the #loveswimming initiative, to heighten the profile of swimming, rather than relying on the four-yearly boost brought by the Olympic Games.

Another is an evolving Health Model, designed to persuade non-swimmers into the pool and given credence by an excellent report on the health and wellbeing benefits of swimming published by Swim England last year.

Currently a "small acorn" trial involving 300 people, Stevenson is confident the model can be scaled up.

"We want to take that to tens of thousands of people. Some might think that's a bit of a stretch, but given our insight, partnerships, and the expertise of the health and wellbeing team, it feels quite attainable. We are very excited by that prospect of helping pools become more inclusive of their communities."

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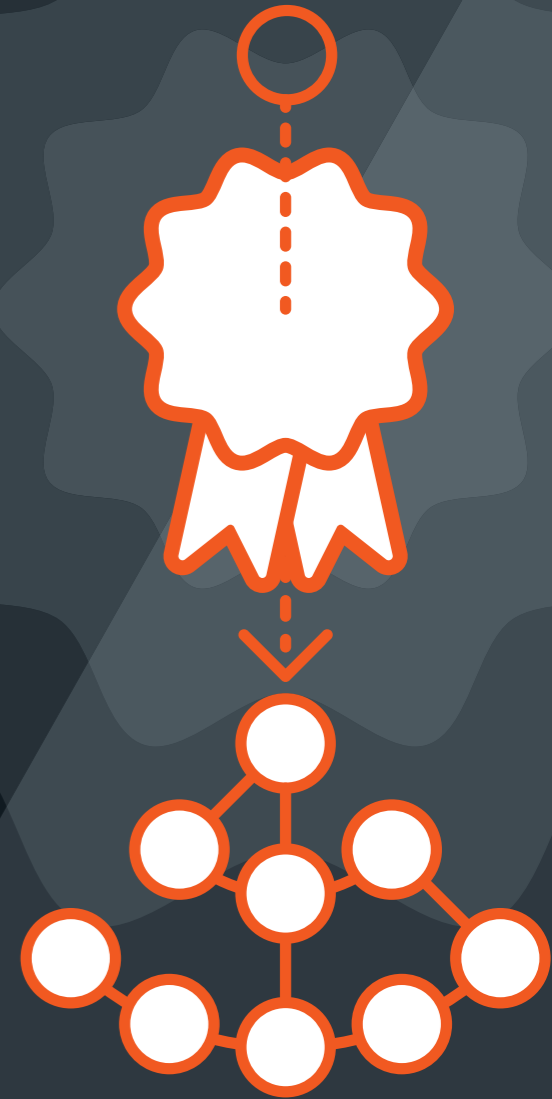


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Looking for the trust

In his book, *The Post-Truth Business*, Sean Pillot de Cheney explores our current political and cultural climate, and how brands can behave and build trust in this context. He talks to Jane Bainbridge about what changes are needed

If you had to pick one thing, what has had the most impact on the post-truth state society is now grappling with? Having a US president who lies, unashamedly, on a continual basis and who sees a free and independent media as the enemy. And having a series of Silicon Valley tech giants who appear to view social responsibility as an irritant doesn't help. In the UK, Damian Collins of the Digital, Culture, Media and Sport Committee, appears to be our version of American attorney Robert Mueller; so let's give him the legal power to take them on.
You talk about the dark side of social media and how that has countered so much of the good

aspects people hoped for when it first developed. With the benefit of hindsight, what could have been done differently? Of all the myriad issues relating to a weaponised social media, the biggest issue to me is the disinformation so badly impacting our democracy. As our current system wasn't built with the advent of a digitised social media in mind, we clearly need powerful legal regulatory oversight on the behaviour of the staggeringly powerful platform gatekeepers.
 Their legal status needs to be changed, stopping them from hiding behind their 'merely a tech company' argument to a newer hybrid that sits

between the neutral tech-enabler v media-publisher models. And any newly empowered institutional body needs powers – including swiftly being able to enforce far greater transparency of political advertising, something that has run rings round our electoral laws, with disastrous consequences.
If politics is dividing people more profoundly than ever, what does this mean for brands understanding their consumers? The overt hostility in society, illustrated by the rise of populism on an international basis, means our understanding of the macro issues impacting communities and the ramifications on an individual and household basis, has to be illuminated and clarified from a business-relevance perspective.

A stark example is the relevance, from a brand safety angle, of how political information is accessed – what that information is saying and how it is portrayed alongside other supposedly relevant brand content. With social media such a key news source, we've all become aware of divisive and extreme viewpoints being promoted on both an overt and covert basis, where brands are often not keeping the company they wish to keep.

There's a common belief that younger people have a more relaxed attitude to privacy – do you agree? That may have been true historically, but it's changing, particularly as we see the tech giants so frequently portrayed as the 'enemy within'. Young people can see how future employers are referencing their social media behaviour to judge employment suitability. Meanwhile, understanding that personal data has financial worth, and is therefore a tradeable asset, is only in the early stages – that is, from a 'privacy for rent' perspective.
In a post Facebook/Cambridge Analytica era, what does it mean for marketers using data to micro-target? There's obviously nothing wrong with the entirely practical commercial strategy of deciding to aim specific, tactical messages at a relevant audience. But, those commercial messages need to be done with empathy and respect in mind – just because you can, doesn't mean you should.

Will the General Data Protection Regulation (GDPR) help brands regain consumer trust? It's early days about exactly what mainstream consumers' understanding of GDPR will be from a trust perspective, but the overall concept seems a hugely positive move. If the reality of GDPR does indeed live up to the hype – albeit a hype that was communicated in a way that generally lacked any semblance of clarity – then, hopefully, it will prove

●
Having a US president who lies, unashamedly, has had the most impact on post-truth society
 ●

to be one of the positive foundations for the rebuilding of trust that we'll see in Europe.
We hear a lot about purpose and how brands need to be meaningful, but surely with many purchases, consumers don't think about anything beyond the immediate price and availability? When does, and doesn't, conscious consumerism come into play? I completely agree that while 'brand purpose' has been stressed for years, it's often been little more than corporate whitewashing. But while there's absolutely nothing wrong with brand purpose – when appropriate – what does concern a great many people is that marketers appear to have forgotten the equally vital 'what' and 'how' of businesses from a brand-authenticity perspective.
We're told consumers now have control, and the importance of 'consumer-centricity' is trotted out by marketers. But the tech giants seem in total control – beyond even government

intervention. So, who do you think has control? When it comes to controlling the 'monsters' of Silicon Valley, there's a lot of talk of this having to be done at a UN level to have any real global effect – as opposed to actions taken on a country-by-country or even brand-owner basis, which appear puny by comparison. It is, of course, a great irony that one of the key fault lines in the consumer-power argument is that, almost uniquely, it's in the world of social media where individual consumers appear to be effectively powerless to take their custom elsewhere. And this is down to a situation where there's effectively no direct competitor to Facebook.

What do you think is the biggest impact of post-truth business on those working in market research and insight? Understanding the lack of trust consumers have with the world around them, ranging from institutions to brands. A great deal of the accepted thinking within brand teams is received wisdom, and I believe the issues surrounding that most basic of points – brand authenticity – often needs to be reviewed and refreshed to rebuild that most vital of links.

What are the key elements of your post-truth manifesto for brands? Be authentic and transparent. Respect privacy, show empathy and be trustworthy.

● ***The Post-Truth Business: How to Rebuild Brand Authenticity in a Disturbing World*, is published by Kogan Page.**

The need for curiosity and creativity

Business needs to establish processes to make curiosity part of people's jobs, argues Anthony Tasgal in his new book, *The Inspiratorium*

Research departments everywhere have been renaming themselves 'insight', but the simple act of renaming isn't enough. We need something more than cosmetic – a radical shift in market research, to root it in creativity and disruption. In this era of information overload, we need to look again at insight, and drag it kicking and screaming into the domain of creativity.

De-ghettoising insight

Part of the problem lies with business' desire to keep calm and carry on while reducing marginalising insight. Behind this is the obsession with short-termism: the drive to make the numbers, to be reliant on metrics and KPIs – something I call 'arithmocracy'. In this suffocatingly defensive system, anything that is seen as too creative (pink, fluffy, daring) is outsourced to people with beards in Shoreditch.

Let's not be frightened of insight; let's not shy away from creating the 'aha' and 'eureka' of insight within the body of every corporate. Unless we integrate a sense of curiosity, creativity and imagination in our employees and colleagues, as well as across the education system, we will do little but pay lip service to the insight we claim to crave. Integrate insight – don't fear it.

Generating insightment

There are several key principles and practices we can learn and apply to our business cultures. To make them porous and liable to 'insightment'.

- Theorists of insight conclude that true breakthroughs come from serendipitous collisions and combinations, created largely in the unconscious thinking System 1, and often happen in what are termed 'bed, bath, bus' situations, when the conscious System 2 is offline.
- It's not the winning, it's the taking apart. What

many scientists and creative people observe is that insight is not about a linear accumulate-and-await approach, but rather about 'stand back and jump out'.

- Don't fear the power of conventions and assumptions. Never settle for the obvious but take everything – all assumptions and heuristics – apart. Adopt the motto of the US Palaeontological Society, *frango ut patefaciam* – I break in order to reveal.
- Be non-linear and indirect in searching for novelty and setting objectives. Obliquity, as economist John Kay suggests, is often the best approach to achieve what you seek, rather than bullishly going direct.
- Insight often comes about through naivety. Outsiders – such as Michael Ventris, who decoded the Linear B script, the syllabic writing of the Mycenaean Greeks – succeed by asking innocent questions that experts are too cognitively invested in to ask.
- Humour, wit and playfulness are far more fertile than our po-faced, reductionist arithmocracy will tolerate, but we need to find ways of taming these qualities and breeding them in corporate cultures. Wit, we should not need reminding, means humour and sharpened intelligence – both keys to seeing things differently.

Integrating insight

Let's marinade business-as-usual in 'insight'. Let's ensure we decompartmentalise and create a process for making curiosity integral to our jobs, rather than a mere... well, curiosity.

Some ideas of which I have direct experience include:

- Discourage groupthink by deliberately recruiting against the norm. The instinct to recruit 'in one's image' is ingrained, but can lead to the perpetuation of conventions and lazy

In this suffocatingly defensive system, anything that is seen as too creative (pink, fluffy, daring) is outsourced to people with beards in Shoreditch

assumptions about the market, the brand and the consumer. Ad agencies have become especially adept at recruiting in this way.

- Legitimise, condone and even reward curiosity. As someone who lectures at university – and as a parent – I often lament how so much of the marketing/comms industry tends to attract curious, open-minded young people, but the pressure of deadening deadlines, performance and a maximising culture often bleeds the curiosity out of these still innocently questioning minds.
- Institute 'meandering time'. Companies such as Google are famed for not just sanctioning this approach, but positively encouraging it, by allowing staff time to work away from their main projects. Founders Larry Page and Sergey Brin first highlighted the idea in their 2004 initial public offering (IPO) letter: though it seems to have waxed and waned – it was originally designated as 20%. Even at Google, however, this time is dedicated to 'side projects' rather than allowing people to truly wander without boundaries. In one case, we set up Diversity Days – allowing staff a day each quarter to do, or try, anything they choose; all they have to do is discuss what they learn and how they (or the company) might see things differently as a result.
- Bring in 'ad hoc outsiders'. I have a couple of clients where part of my retainer relationship is to take an outsider's view of their research, to identify previously unseen connections – as good a definition of insight as you can ask for – and propose new research, marketing and comms ideas off the back of it.

If we think differently about insight and curiosity, and scratch the creative itch wholeheartedly, we are more likely to be seduced by its charms and find the inspiration we so desperately desire.

- Anthony Tasgal's book *The Inspiratorium* is published by LID Publishing

Nurturing a non-exec portfolio



Exactly a year ago, after 33 years in the City, I decided to leave Numis, the investment bank and stockbroker that I helped build, to 'go plural' with a portfolio of non-executive directorships.

I was determined to leave in a bull market, singing and dancing, not weeping and wailing in a bear market. I had already been a non-executive director on two trusts – an investment trust and a venture capital trust – and, after 17 years at Numis, and as a main board executive director for the majority of that time, I thought I had the right level of experience and skill set to do the job.

According to the Institute of Directors, non-executive directors are appointed to bring independence, impartiality, wide experience, special knowledge and personal qualities to the board. In addition, an effective non-executive director is expected to: contribute to the strategic direction of the company; solve problems that arise efficiently; communicate with third parties; ensure all the audit requirements are satisfied; decide the remuneration of the executive directors; and appoint the board of directors.

So far, so obvious – but, to me, the job centred on four key areas: strategy, performance, risk and people. To take those in turn: Strategy – my job would be to challenge constructively and contribute to developing strategy; Performance – I would scrutinise management performance in achieving goals and objectives, as well as in monitoring and, where necessary, removing people; Risk – I would need to satisfy myself that financial information was accurate and that financial controls and systems of risk management were robust and defensible; People – I would try to benefit the company's and board's effectiveness through outside contacts and opinions.

The catastrophic collapse of Carillion reflects the failure to adhere to these four pillars: to adopt a strategy where major infrastructure contracts were won on price and lost money; to prioritise bonuses and dividends on the back of underperformance, and even as the firm neared collapse; to fail

to address the lack of cash generation and constant need for external financing and massive squeezing of contractors; to ignore the outside world's dire view and the hedge funds heavily shorting the stock. In short, the directors vastly overstretched the company and grossly mismanaged its affairs. As Charlie Munger, Warren Buffett's business partner, has said, show me the incentives and I will show you the outcome.

The challenge for me was to find the right media companies. By right, I meant businesses with a leading market position, good operating margins, management with skin in the game and a strong balance sheet with little or no debt. I reckoned, that way, shareholders could be assured of above-average top-line growth, robust cost control and rising dividends, with cash generation not diverted to servicing bank debt.

Management with something to lose would not waste precious equity making expensive acquisitions or valuable cash flow buying back stock at the top of the market, but would instead focus on cost control and organic growth – real owners, who would steal market share instead of paying through the nose for it. I also wanted a small, mid- and large-cap company, as the shareholder base would be different

across the size spectrum. Like everything in life, Lady Luck played her hand and three vacancies came along in three companies that met all my criteria. Small-cap agency (M&C Saatchi); a mid-cap B2B player (Euromoney Institutional Investor); and a large-cap online business (Rightmove).

Then, being a sucker for brands, along came a fourth non-executive opportunity that I couldn't resist – Finsbury Growth & Income Trust, an FT 250 investment trust, with a concentrated 25 stock portfolio of leading global consumer and media brands. It is managed by the legendary Nick Train, who is famously "busy doing nothing" and producing a performance that has been second to none for decades. He has mastered the Zen-like ability to be 'right and sit tight'. I am hoping it will rub off.

● **“Management with something to lose would not waste valuable cash flow buying back stock at the top of the market”** ●

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Three little words

One start-up is rethinking the way that addresses work, with data potentially simplifying navigation in hard-to-reach, remote parts of the world.

By Katie McQuater



Geo-location platform what3words is on a mission to change the world. Literally. The company wants to rethink an infrastructure so ingrained that we barely stop to question it any more – addressing.

Street addresses are a relatively recent invention, emerging across Europe in the 18th century. They are not universal, however – and, in many parts of the developing world, a lack of addresses can deny people a legal identity, participation in democracy and access to public services.

In addition, addresses and GPS can only take us so far: if you've ever attempted to find your way to a sprawling festival site using sat nav, typed in an address only to find there are 34 Victoria Roads in London, or tried to locate the correct entrance to a large office complex, you've probably experienced the frustration uniquely associated with navigational systems' limitations.

According to a OnePoll study commissioned by what3words, only 30% of street addresses in the UK lead directly to the entrance – rising to 70% internationally, for a survey of 3,000 motorists in the UK, the US and Germany. While 80% of drivers use sat nav, 87% of them don't trust it to get them to the correct destination every time – and 22% said it had led them down the wrong path at least once.

Such inadequacies are, at best, a nuisance for motorists, but they also slow down the logistics sector and can encumber emergency services – 75% of UK survey respondents said deliveries, services and visitors have struggled to find their homes or businesses.

Founded in 2013, what3words wants to solve this problem by using an algorithm that divides the world into a grid system, comprising 57tn 3x3 metre

squares, each assigned with a unique three-word phrase – the rationale being that words are more memorable than numbers.

"Lots of people have recognised there's an issue with addressing, and everyone has solved it in the same way," says the company's chief marketing officer, Giles Rhys Jones. "Everybody has added the alphabet to numbers and reduced GPS coordinates to an alphanumeric, but they're difficult to remember and communicate."

The system converts GPS coordinates using a database of around 40,000 words and has removed homophones such as 'hear' and 'here' to avoid mistakes in voice recognition. Similar-sounding locations are also placed thousands of miles apart so there can be no ambiguity – for instance, table.chair.lamp is in America, while table.chair.damp is in Australia.

The system has obvious affinities with the logistics and auto sectors. Tests conducted by the company highlight its efficacy when used for deliveries – a logistics company tested the approach, versus traditional street addressing, and found that using three-word addresses cut delivery times by 30% over the course of 20 deliveries. This year, what3words has partnered with Mercedes to install the technology in its new A-Class cars, and it's being used by firms, such as Middle East delivery company Aramex, to improve delivery routes.

In Mongolia, where addressing is scant, people can use the system for everyday tasks such as delivering post, ordering a pizza, or applying for a credit card. Lonely Planet has also added three-word addresses to the latest edition of its Mongolia guidebook, which it believes will help travellers get about as easily as locals in a country

● **"In many parts of the developing world, a lack of addresses can deny people a legal identity"**

that is "notoriously difficult to navigate", according to destination editor Megan Eaves. "Addresses are scarce, and signs are few and far between. This made it a natural starting point to introduce these three-word references into our content."

Although the algorithm itself doesn't change, the company is adding new languages – there are 26 currently – and features to the app, such as being able to save places. It has also developed a sorting system, using character recognition, to understand what a three-word address is, which it then uses to sort mail and packages.

A look at user behaviour on the app also points to the impact an increasingly digital world is having on the way people interact with the physical world around them. For instance, the company noticed that photographers were using three-word addresses on Instagram to tag the remote places around the world where they'd taken a photo – so it developed an app that drops the three-word reference directly onto a photograph once a user has taken a picture.

The photo app is now also being used for civic involvement – people use it to report lost bicycles, water leaks and potholes – and some Airbnb hosts use it to take a photo of their front door and send it to guests when they make a booking.

What3words' ambition is to become a global standard for addressing, and it's currently having conversations around country infrastructure and becoming a legal form of address.

"This year, we'd like to get a country [to adopt] the system," says Rhys Jones. "If you don't have an address, you're invisible to the state – you can't vote, and it's difficult to get financing, aid and deliveries. There's a bunch of people in the world who don't have an address, so – if we can help that – it's pretty powerful."

Other applications of location data

● **Project Sunroof**

Using data from Google Earth, Google Maps, 3D models and machine learning, Google's Project Sunroof initiative, in partnership with E.ON and Tetraeder, allows consumers to check how effectively their home could be powered by solar energy using estimates on their house's solar potential. The model assesses the amount of usable sunlight and features, such as roof space, to assess a property's viability for solar energy.

● **Minimum Fleet Network**

Overcrowding on New York City's roads could be addressed with an algorithm determining the minimum number of taxis needed to keep the city moving, according to a paper in *Nature*. The Minimum Fleet Network, developed by researchers led by Carlo Ratti, director of MIT's Senseable City Lab, proposes a coordinated operation that relies on an algorithm to identify passengers' locations. The model could reduce the size of New York's taxi fleet by 40%, according to the researchers.

● **Replica**

This anonymised tool, by Sidewalk Labs, gives insights on how people move around for work and life. Instead of using location data from smartphones, which can include personal information, the tool uses anonymised data from about 5% of the population to create a behaviour model based on travel patterns. This is checked against data such as manual traffic counts or numbers of people using public transport. The model is combined with a representative population to replicate patterns in movement across an area.



What3words has divided the world into a grid system, comprising 57tn 3x3 metre squares

The ethics of AI

Artificial intelligence is introducing speed and reliability to many number-crunching exercises. But Bethan Blakeley argues that the algorithm shouldn't rule unconditionally

Not a day goes by without us being told about some of the amazing things artificial intelligence (AI) can do, and is doing for our world and our communities. Then there's what it's doing that we don't know about yet, because the results are not ready for publication. It really does seem as though the uses of AI are only constrained by human imagination.

Now, I'm not diminishing any AI applications – whether helping farmers detect crop disease; being used to diagnose cancer and create personalised treatments; or driving a car. But I am questioning whether we should be using AI in some of these applications, whether we're comfortable with some of the outcomes of these algorithms, and how they affect people's lives. Can we whole-heartedly agree there is nothing wrong with these situations ethically, morally, emotionally, or otherwise?

Nothing is black and white, there's always a grey area. And so it is with AI – but this is often overlooked or ignored because of its unbiased, unemotional, unhuman nature. Safiya Noble, author of *Algorithms of Oppression*, argues there are

no ethical procedures or guidelines in place for AI yet because it's too new and unexplored.

That is exactly why we need to start exploring these grey areas: what they mean; where they are; how we feel about them; and what we're going to do to protect our communities from them.

I recently attended a workshop showcasing an agency's new software, which allowed participants to be moderated by chatbots. My instant question was about transparency: did the participants know they were speaking to a bot? The shock on the presenter's face was enough to tell us that no, they did not...

"Nobody has asked us that before. Uhhh... no, they don't know. Does it matter?" In my opinion, yes, it does. The idea of someone thinking they are speaking to a person when they aren't doesn't sit right with my conscience. Research is one thing, but what about other areas where chatbots are used? Banking. Aren't we forever trying to teach the most vulnerable members of the community not to disclose personal banking details, and not to talk about financial details with anyone? Healthcare. How do you feel about teenagers at school with mental health issues airing their frustrations, their worries and fears, to... a piece of computer code?

Social media is another area where AI is used to 'improve the experience' – making the ads and the 'follow' recommendations you see more relevant to your interests, and suggesting phrases you may

want to use to reply to a personal message. AI has also been used to manipulate your Facebook feeds to make you feel happier or more upset – 689,000 users' home pages were altered as part of an experiment, where it was found that, by enforcing certain types of content to appear, it directly influence users' emotional states. How much do you trust Mark Zuckerberg and his team – would you trust them with people's mental health?

One of the most prominent examples of AI in our everyday lives is Google. There are 3.5bn searches on Google each day. Noble explores the algorithms behind Google and similar search engines in her book, showcasing the racism and sexism that is – or used to be – evident by Googling phrases such as 'black girls' and 'why are black women so...' where the first few pages of results were always pornographic and derogatory. Given the way that Google is portrayed to the general public, as a font of all knowledge, a trustworthy replacement for the library, are these the 'facts' we want to portray?

The manipulation of information on the internet is not a new idea. As Clay Johnson, the co-founder of the firm that built and managed Barack Obama's online campaign for the presidency in 2008 pointed out, questioning the laws in place for issues like these: "Could the CIA incite revolution in Sudan by pressuring Facebook to promote discontent? Should that be legal? Could Mark Zuckerberg swing an election by promoting Upworthy [a website aggregating viral content] posts two weeks beforehand? Should that be legal?"

Let's step this up a notch. If you're struggling with the notion of trusting AI to educate the general public, how about letting AI decide who goes to

prison and who goes free? Cathy O'Neil, author of *Weapons of Math Destruction*, explains a little about one of the algorithms (the LSI-R questionnaire) that predicts whether someone will reoffend, and therefore, whether they are likely to be released on bail. She argues that a large proportion of the data used to inform the algorithm would be dismissed in court, under claims of it being irrelevant, such as family members' criminal records. Is this fair? Should we be considering your step-brother's criminal record when deciding if you can have early release from jail? What about your income growing up as a child? Your address? Your friends and their personal histories?

There are 12 people on a jury; if decisions in court can be made so easily that a computer can do it, why do we need 12 people to deliberate the verdict? Why have some cases lasted as long as two years? Because it's subjective. It isn't black and white, just like anything else. It's important to get to grips with that fuzzy grey area – to understand the stories, the perceptions, the context behind the facts. And when you're dealing with a consequence as serious as someone's life, you want to make sure you've really understood that context. Can an AI program do that to the same level as a human? I would say no – or at least, not yet.

Which is why we need to be careful about whole-heartedly diving into the world of AI. That's why we need human interactions, interventions and supervision. Machines are just that – machines. And as they become more and more lifelike, we would do well to remember that.

Bethan Blakeley is director at Honeycomb

54 the number of questions, across 10 categories, the LSI-R common algorithm uses for determining early release from prison

2006 the year Google was added as a verb in the Oxford English Dictionary

Cutting through the data fog



I'm borrowing from Charles Dickens here, but the vast expanse of data available to us can feel overwhelming at times, and the challenge of interpreting it like wading through the foggy landscape he once described in *Bleak House*. As data analysts, we are required to make the most of the data we have in our organisations, and to find a route through to the insights that lay within.

The MRS conference on analytics earlier this year highlighted the vast range of analytic approaches being adopted across the industry. Regardless of the approach we may take, what struck me most is our collective reliance on connecting different data to add deeper analytic value. Whether it be traditional modelling – for example, linking weather data to the adoption of a brand or applying social data as a determinant of consumer behaviour – at the core of all of this is the principle of connecting data to create better analytic findings.

While data connectivity is not new, there is an important opportunity for analysts to think about the concept of this connectivity in a different way – moving away from standard, one-off solutions towards continuous connectivity, to give a more seamless and 'always-on' analytic approach. This requires us to be open, however – to new approaches, ideas and partners, and to outside solutions and data sets – so we can be focused on the greater good and the best possible solutions for our clients.

My own experience of this thinking came when working in the digital industry, where openness across agencies created new measurement approaches that are now adopted across the media industry. This collaborative approach was refreshing, and a departure from that of the traditional market research world.

Datasets can operate in isolation – that we know – but where data connects is where we can build value and deliver greater insights to help shape our business, and that of our clients.

An increasing number of organisations are focused on adopting this way of working and, specifically, on how continuous data integration can help them automate to move more quickly and to differentiate themselves.

Application programming interfaces (APIs) are now just the start of the conversation, as businesses – such as us here at Nielsen – are investing in developing the necessary pipes to create networks that connect disparate internal data sets to third-party data.

Our focus is firmly on opening our ecosystem and making our data available to partners, and we're doing this in three ways. Firstly, we're opening up and integrating our internal data sets to

make our services even more useful and relevant to our clients. Secondly, we're opening up our data to our clients, so they can integrate and connect it into their own data networks. Finally, we're making our data available to other businesses, start-ups and developers, so we can connect and work together on new and innovative applications for clients.

Being open isn't always easy, but we firmly believe that, where there is nervousness, we need to dust off the non-disclosure agreements to provide the cover for this new way of thinking – and, at worst, we walk away, but with the knowledge that we have tried.

Data is everywhere. As our individual behaviours leave an ever-expanding data footprint, our challenge is to think bigger about how we can work together in the spirit of openness and collaboration to advance the abilities of our industry – to cut through the fog and push the traditional boundaries of analytics.

Connected data approaches lead to faster, smarter and more coordinated decision-making. Given the complexity of the data pool available today, connectivity needs to be at the heart of any data strategy – and simplification should be the guiding principle to achieving it.

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“Data is everywhere. Our challenge is to think bigger about how we can work together to advance the abilities of our industry”
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Brainwaves and soundwaves

Music can be a powerful emotional driver, but a recent study wanted to go a step further and prove the positive impact of live music on our brains. By Katie McQuater

Personalised playlists, access to millions of tracks at the touch of a button and album launches announced on Instagram. Music has changed immeasurably in recent years, but one thing that hasn't disappeared is our love of a good concert. Live music is flourishing; a 2017 study from professional services firm PwC suggests live music will be worth \$29bn by 2021.

Yet how can the concert experience be quantified when survey research relies on self-reported behaviour and feelings? A recent experiment by entertainment company Live Nation and creative technology firm TBD Labs sought to understand what is so compelling about live music, using biometrics to measure fans' reactions and brainwaves during a concert.

Live Nation had already conducted qualitative research in the US and a global survey in 11 countries, and found there was an appetite for an antidote to information overload created by technology. Amanda Fraga, vice-president of strategy and insights for media and sponsorships at Live Nation, calls the trend 'sensation deprivation'.

"Everyone we spoke to talked about the influx of information and technology chipping away at people's minds and time," she says. "They were thinking about how they can recalibrate their lives for more meaningful connections, and live music is obviously a catalyst for that."

Referencing Daniel Levitin's book, *This Is Your Brain On Music*, and music's ability to boost social connection, Fraga adds: "Live music releases oxytocin, a bonding hormone; we're bonding with the people around us, even though they're strangers."

This hypothesis – that live music would lead to higher emotional intensity and boost social bonding

– was the starting point for the study, which wanted to prove the value of live music as a channel for brands.

"Live music is a social-bonding experience, an emotionally intense experience – consumers say it, but there's no way to quantify it and compare it to other media channels," says Sam Joseph, founder and director of TBD Labs, which proposed the use of biometrics – specifically electroencephalography (EEG) wearables and galvanic skin response (GSR) – to measure fans' brain activity and physiological responses.

The setting for the research was a St. Vincent concert in Charlotte, North Carolina, where fans who had already bought tickets were recruited to take part. Eighteen participants were fitted with a Muse headband for the EEG study, to analyse brain activity during the concert, while another 15 wore the headbands to track their movement using its accelerometer. Five participants from the movement study also took part in a GSR study.

Baseline measure

The study measuring brain activity was conducted simultaneously, with

each participant undergoing four separate measures lasting 10 minutes – one of which was a baseline measurement taken before the concert. This was partly because they had to sit still, not move their heads and avoid clenching their teeth, which could add 'noise' to the data. Additionally, participants had to refrain from drinking alcohol, and left-handed people couldn't take part, because their brainwave data would differ from that of right-handed participants.

By studying music fans in as close to a natural environment as possible – with the caveat that participants had to remain still – the research attempted to capture the reality of how music is

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"Left-handed people couldn't take part, because their brainwave data would differ from right-handers"
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experienced, insofar as technology allows. While biometrics have been widely used across various sectors to test reactions to stimuli, they have rarely, if ever, been employed outside of a laboratory. But the recent study's real-world setting was an advantage for Mona Lisa Chanda, neuroscientist and co-author – with Levitin – of *The Neurochemistry of Music*, who oversaw the research. It allowed large amounts of data to be collected quickly, from multiple participants. "We were able to make the outside world our laboratory," says Chanda.

Of course, the environment also brought some uncharted challenges for the researchers: using Bluetooth for data collection (the headbands were paired to smartphones) opened up the possibility of interference from multiple devices and the stage, resulting in the potential for noisier data than that collected from a conventional environment.

Ahead of analysis, Chanda carried out the time-consuming, but necessary, task of pre-processing the raw signal to make sure the signals being interpreted were from the brain – filtering out unwanted noise, such as muscle movements or electrical artefacts. She then quantified the value of the theta, alpha, beta and gamma brain rhythms within the prefrontal cortex – the part of the brain associated with attention, memory, and developing and pursuing goals.

"The alpha rhythm is the most predominant oscillatory activity in the human brain, and numerous neuromarketing studies have reported changes in alpha power values during the viewing of TV shows, film clips or other media," says Chanda. "Consistent with this, I discovered that the alpha

rhythm showed the greatest sensitivity to the effects of live music in our study."

Emotional intensity

Alpha power actually decreased for 90% of participants during the performance, compared to the pre-concert baseline. This may seem counterintuitive, but – according to Chanda – it suggests the participants experienced high levels of attention and engagement during the concert. "A decrease in alpha power is associated with an increase in attention to one's surroundings and higher levels of information processing," she explains.

The GSR study also identified a 53% increase in emotional intensity and the movement study indicated an increase in synchronised movement, suggesting higher levels of social bonding.

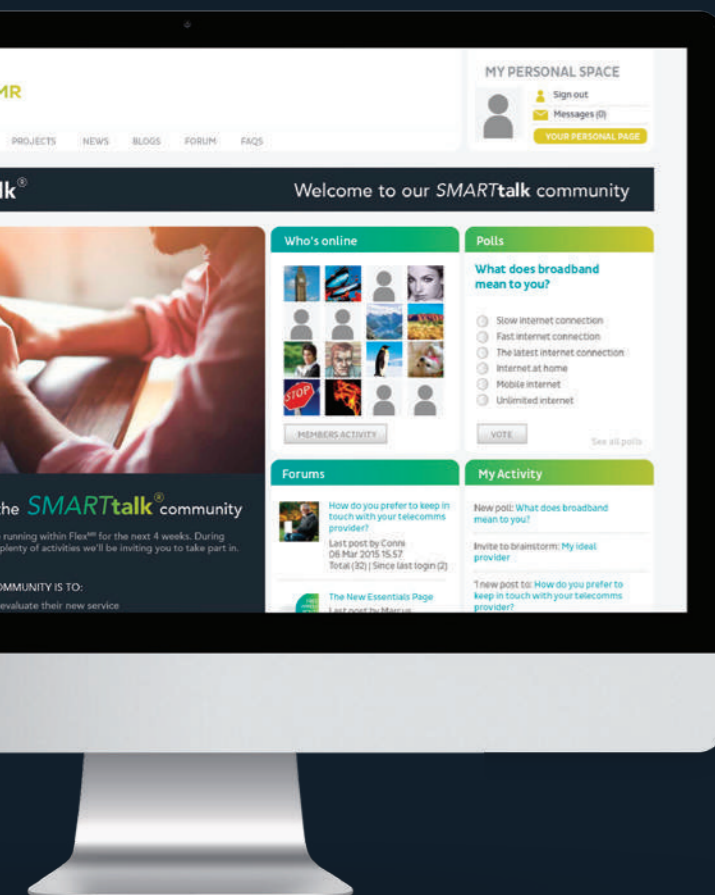
Alongside the live study, TBD Labs conducted pre- and post-concert research with participants, correlating people's self-identified responses with their physiological response data. Those who had displayed stronger movement synchronisation with others during the performance also reported greater feelings of connection, according to Chanda.

People who had a greater shift in alpha power also showed more receptivity to brands, and experienced positive mood increases, which has implications for commercial messaging, according to TBD Labs' Joseph. "Brands that want to activate [at live music events] should be doing activations that seamlessly integrate and help people enjoy the experience, and get lost in it, even more, or they should do something that helps people connect with others and brings social bonding to life."




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Virtual assistants, real issue



Of all the buzzwords that have emanated from Silicon Valley over the past 20 years, ‘disruption’ may well be the one most often repeated in boardrooms around the world. The theory of disruption is fairly simple: it’s an aggressive form of innovation that involves rethinking a business or industry, but outside of the rules or assumptions that currently govern it. The catch being, of course, that it’s more difficult than it sounds to think outside of those assumptions, so ingrained are they in our day-to-day work.

Last week, a friend of mine uttered a sentence that suddenly made me see the assumptions that underpin the market research industry in a more fragile light, and think more about future disruption to our world: ‘Alexa, order me some batteries.’

If we think back to the Jobs To Be Done framework that I’ve written about previously, the real functional need in this example was that my friend was going camping in a few days and she needed her torch to work. As long as that happened, she would be happy with her purchasing experience. The convenience of being able to voice her need aloud and have the product arrive the next day vastly outweighed any mild brand preference she might have.

A lot has been written about the implication of voice/virtual assistants for brands. As platforms such as Amazon Echo or Google Home become more common, consumers essentially delegate the responsibility for choosing a specific brand to an algorithm.

For many researchers though, the primary focus of our jobs is to understand why a consumer might choose one brand or another – to help marketers connect deeply with what goes through a consumer’s mind at the moment they choose a brand off a shelf.

This type of shopping clearly risks eroding the importance of brands. Although the impact would be most immediately felt by everyday, commoditised, packaged goods brands, it’s important

to recognise that a large proportion of the research industry’s work comes from brands exactly like these.

Voice/virtual assistants not only disrupt marketing by changing the role and importance of brands to people, but they could also reduce the need to understand consumers’ choices – and severely disrupt the market research industry, too.

Ultimately, if more people buy batteries in the manner that my friend did, it may become more important for brands in that industry to understand the algorithms that might select their product over their competitors’ than it is for them to understand the consumers themselves.

This poses some questions for the research industry: what would our new purpose be in a future where understanding consumers is no longer such a high priority for brands? What if choices are defined by algorithms rather than consumers?

“As Amazon Echo or Google Home become more common, consumers essentially delegate choosing a specific brand to an algorithm”

In my opinion, there are two possible paths to take if we are to anticipate this future challenge. First, understanding which brands are most at risk of being overlooked by consumers who start to shop like this is going to be critical in the short term. We should be helping

marketers anticipate this change and start building new consumer habits. If we can understand, for example, how to ensure consumers retain a degree of brand preference – and think to say ‘Order me Brand X’ – then that will delay the risk.

Second, as our industry continues to develop more advanced skills in data science, we have the opportunity to help brands decode these algorithms. Just as the discipline of search engine optimisation (SEO) emerged to help brands navigate the new world of search in the late 1990s, there will be a need for a similar role to decode shopping algorithms in the coming years.

If you have any ideas on how to reimagine or disrupt the research industry, and break some of the assumptions with which we all work, please do share them. It’s a topic that I’d encourage us all to think about.

Tip the balance

Is it possible to predict the point at which social change will occur? A new paper has found that a quarter of a population could be enough to overturn established conventions.

By Katie McQuater

For years, social scientists have theorised that changes in social norms can occur because of small but committed groups of people pushing for change, and that established conventions can be overturned when a critical mass of opinion is reached – the tipping point – leading to social change.

The exact stage at which tipping happens has been debated. In standard economic theory, equilibrium stability analysis suggests that a group will only change if 51% of its population initiate the change, while other studies have suggested 10% of people in a group could be enough to shake it up. In a world where ideas can spread faster than ever via social media, the ability of activist movements – such as Black Lives Matter and #MeToo – to propagate social change has taken on new significance.

While the argument for tipping points is persuasive, however, there has previously been no empirical evidence to prove their existence, or to quantify the

critical level for social change. Does a group really need half of its members to advocate for new norms, or can conventions be overturned by a vocal 10%? Is it even possible to measure?

“Mathematicians and physicists have spent decades building theories that try to predict where the ‘tipping point’ for social change might be,” says Damon Centola, a researcher from the University of Pennsylvania, who has studied the subject for the past 10 years. “While there have been dozens of theories, none of them have been empirically tested – so while the tipping point is a provocative idea, there has never been concrete evidence that it exists.”

Change dynamics

The biggest challenge of studying critical-mass dynamics, Centola explains, is that – to understand successful social-change efforts – these events would need to be studied side by side. “‘History’ only

happens once. If an activist group fails, it is hard to know whether they would have succeeded if only they had been a little bigger – or, if they succeed, it is hard to know whether they might have failed if something had been different,” he says.

In a new study, Centola and co-researchers from the University of Pennsylvania and City, University of London, present evidence for tipping points by setting up an artificial system of social conventions, mimicking the social coordination processes and change dynamics that occur in everyday settings.

The researchers recruited 194 participants via websites such as Reddit and sorted them into 10 online community groups, varying in size from 20 to 30 people. They were given the task of interacting with a randomly chosen partner with the aim of agreeing on a linguistic convention. They were shown a picture of a face and asked to come up with a name for the person pictured – for example, Sarah, Simone, Deirdre, and so on.

The naming happened simultaneously, with participants incentivised to match with their partner; if both partners selected the same name, they were rewarded financially, whereas failure to match would lead to both being penalised. If the partners failed to match, they were shown each other’s selections, so they learned about the choices others were making before moving on to interact with someone else – until a naming convention was agreed upon, and a social norm was established.

“We allowed people to circulate and interact with lots of different people, to see if a shared linguistic norm would emerge for the population as a whole. After a short period of time, everyone would converge on using a single name,” says Centola.

Committed minority

The researchers then introduced an activist group into each of the communities, which attempted to overthrow the agreed norm by promoting an alternative name convention. For instance, if the group had converged on ‘Sarah’, the activist would try to change the name to ‘Jasmine’.

The ‘committed minorities’ ranged in size across the 10 groups – from 15% to 35% of a group’s population – but the tipping point that emerged across each of the studies was the same: roughly 25%. The finding not only cements the existence of tipping points, but suggests they could be identified within a social system, says Centola.

The researchers were also able to see which groups

were on the verge of tipping. In the clearest example of this, the minority went from a complete failure – with no converts – to converting the entire group by adding a single person to one of the activist groups. “A movement that appears to be failing may instead be right at the cusp of succeeding,” says Centola.

Dark side

The paper stresses that 25% is not a universal value for changing social norms and more work is needed within other social settings. However, Centola believes the results could be used to design online spaces where it is possible to initiate “useful social change” – because, just as critical-mass dynamics can lead to positive social change, there is a dark side to tipping points: they can be used by governments and organisations looking to exert control.

The paper points to recent work by the 50 Cent Party in China, a group of internet commentators ostensibly employed by the government to infiltrate online communities anonymously to subtly influence dialogue, manipulating public opinion of the government.

Centola is currently working on a new study examining whether commentators ever reach the tipping point of 25%.

Understanding where tipping points occur could also be pertinent for the workplace. Once norms are solidified as an organisation’s ‘culture’, they are reinforced by all employees, but a small group of individuals could be enough to shift the dynamics of a large organisation – an enticing prospect for tackling toxic cultures.

“Building on the idea that originally inspired me – that is, [Rosabeth Moss] Kanter’s idea that norms of sexism in corporations could be overturned if only a critical mass of women was reached – the good news from this study is that social norms are remarkably flexible,” says Centola.

“Big changes that eliminate sexism from office culture can be achieved if only a few more people join the cause.”

● **‘Experimental evidence for tipping points in social convention’, by Damon Centola, Joshua Becker, Devon Brackbill and Andrea Baronchelli, *Science*, 8 Jun 2018: Vol. 360, Issue 6393**

● ***How Behavior Spreads: The Science of Complex Contagions*, by Damon Centola, is published by Princeton Press**

● **“A small group could shift the dynamics of a large organisation – an enticing prospect for tackling toxic cultures”**

Does your car have a face? Do you choose masculine-styled furniture because it feels 'like you'? Giving human attributes to physical objects can operate on several levels and is increasing with the rise of voice technology – we can talk to machines like friends and choose the voice they respond with.

Indeed, in their communications, marketers often portray brands as having human characteristics – such as being a hero or taking care of the consumer. And, in the case of challenger brands, they may be cast as 'outlaws' breaking the rules of others in the category.

Many research studies have looked at different aspects of humanising brands and a recent paper has collated these to gain a broader view of this area of consumer behaviour.

Deborah MacInnis, professor of marketing at the Marshall School of Business, University of Southern California, and one of the authors of the review, says she was interested in why people develop intense brand attachments, exhibiting enduring relationships that are almost like human relationships.

She brought together three streams of existing research: the human-focused perspective when people anthropomorphise brands; the self-focused perspective when brands are seen as 'being like me'; and the relationship-focused perspective when people have attachments – and aversions – to brands as they would with a partner.

Giving a product a human name, describing it in the first person, and labelling a brand as gendered all increase people's tendencies to anthropomorphise brands.

Epley, Waytz and Cacioppo developed the SEEK model to understand the factors involved. How likely people are to perceive objects in human-like terms depends on their knowledge of people and how they behave.

"Their research suggested that the drivers of anthropomorphism can be clustered into three broad factors: motivations to connect with others (sociality); motivation to make change and be in control (effectance); and to factors in the environment that made human qualities seem more salient (elicited agent knowledge)," explains MacInnis.

These drivers may be associated with how people grew up, or were socialised, their culture, and the personality traits they were born with.

"We thought that this model could be helpful in categorising some of the research in consumer behaviour on anthropomorphising brands, and in understanding how consumers might

A brand relationship

Studies show that people humanise brands – whether that be in their physical form, or by giving them personality characteristics. By Jane Bainbridge



humanise brands in other ways," adds MacInnis.

Anthropomorphism might lead to greater brand trust, although researchers think this may depend on how much consumers trust other people in general, how deeply they process the brand's advertising message, and the baseline for comparison.

So, has humanising brands become more prevalent? "While children have always humanised objects and brands to a certain extent, I think the various elements in the SEEK model suggest this tendency is increasing," says MacInnis. "We know that people are more likely to anthropomorphise brands and objects when sociality motivations are activated – when we are lonely, disconnected, or from a collectivist culture that makes us want to connect with others."

The lonely and disconnected nature of people's lives appears to be increasing, whether because of far-flung families, longer work hours or increased online interactions over real-life ones.

"Additionally – and relevant to the SEEK model – society, and the fear-inducing elements of things like authoritarian leaders, global warming, terrorism, random shootings and more, have made people feel less in control of their lives and looking for opportunities to have power and control," she says.

The rise of the Internet of Things and virtual assistants has introduced a degree of interaction where it didn't previously exist – we can now talk to these devices as if they were another member of the family. So, does this mean some products or sectors are more prone to anthropomorphism than others?

"I am not aware of research that has studied this directly. My sense is that it could be relevant to brands or products that people develop close attachments to because they are self-defined or reflect one's identity such as one's car, and those that are seen as unfamiliar and a bit intimidating and hence need to be perceived as a bit warmer and friendlier, like some new technology," says MacInnis.

"From an aesthetic perspective, the design of many products have lines or curves that make them look more masculine or feminine. This characterisation of products runs throughout interior design, product design and food design. People might choose feminine or masculine or androgynously styled furniture because it is 'like me.'" So, anthropomorphism should be

prevalent in categories that consumers use as signals to others of who they are. This is particularly true in the case of brand personalities, where people want to signal their own personality by the personality of the brand they are using," she adds.

Where brand humanisation does take place, it has the potential to build increased loyalty. When people see a brand as not only like them, but also connected to their sense of self, they are more likely to stick with it.

"Describing a brand in human-like terms – particularly with respect to brand personality – could help in developing a brand story, but I think marketers have to be a bit careful not to go overboard. In many cases, consumers are not aware of a tendency to humanise brands, and when they become aware, they are likely to recognise that and correct for it," says MacInnis.

To date, the research reviewed in this paper has mostly been done on the positive relationship with brands; but what about when the relationship is

more negative? MacInnis thinks there are three negative relationships that might warrant more research: brand betrayal – how people react when a brand they were attached to lies or hides information, or even abandons them for more lucrative customers; brand dependency – when people have no choice; and when people view a brand as their slave.

So, what should marketers take away from this research review?

"Strong brand-self connections create more brand attachment, which, in turn, creates more loyalty and advocacy behaviours. Marketers need to do what they can to secure strong links. Whereas techniques like anthropomorphising might be helpful, brand-self connections can be formed in other ways as well," she says.

Overall, scientists are only just beginning to understand this area, but one aspect that should be explored in future is whether humanising brands is a good thing in terms of people's happiness.

Does it actually reflect some general deficiency in consumers' lives? "The SEEK model suggests that the answer may be yes," says MacInnis.

"We can now talk to these virtual assistant devices as if they were another member of the family"

● **Humanizing Brands: When brands seem to be like me, part of me, and in a relationship with me, Deborah MacInnis, Valerie Folkes, *Journal of Consumer Psychology*, 2017**

The socially driven teenage brain



We're familiar with the idea of nudging – making small changes to choices and messages to steer people to alter their behaviour for the better. This is based on insights from behavioural science, which show how we're all affected to some degree by subconscious cognitive biases and by different contexts.

What's fascinating is that scientists are now beginning to understand how our susceptibility to certain biases changes throughout our life – from childhood to old age. As recently as 20 years ago, scientists assumed that most of our brain's development was completed by mid to late childhood. In fact, through improvements in brain-imaging technologies, we now know that huge amounts of development – remodelling and strengthening some connections while pruning others – continue throughout childhood and adolescence. Our brains have not fully matured until we are in our mid-20s.

Many experts believe this is a period of adaptation, rather than maturation, though. It's a time for teens to bed down their own identity and achieve the things they need at that point in their life, such as forming strong relationships with their own generation, and moving away from the safety of home and out into society.

This latest research helps us to understand different behavioural tendencies across age groups. It suggests we may be more affected by certain cognitive biases at certain times of our lives. So, if you're working in behaviour change, or designing nudges, it may be better to tailor your interventions according to age.

Looking at some of the key findings in the latest research on adolescents, it's probably no surprise that research shows teenagers, the world over, are driven by – and highly sensitive to – peers' interactions and relationships. But the 'why' is

intriguing. It's because their brains are highly sensitive to rewards, particularly social rewards. Evolutionarily, it helps them to forge their own way in life and develop strong connections with the upcoming generation that's on its way in, rather than their parents' generation, which is on its way out.

Adolescents are hypersensitive to being excluded and rejected by their peers, and get far more anxious and moodier than a typical adult.

This drive to be accepted and included can often be the cause of risky behaviours. It's not that teenagers underestimate risk – research shows they are capable of evaluating a risk as well as an adult and, on occasions, are more risk-averse than adults. It's just that they deem a risk worth taking if there could be a social reward.

This means they often choose more risky behaviour when among their peers. For example, statistics show that younger people are far more likely to have a car accident when they have a passenger in the vehicle, whereas it's the reverse for adults. This is because the risks don't need to be physically dangerous for adolescents to see them as a risk.

Neuroscientist and expert on the teenage brain Sarah-Jayne Blakemore says adolescents see social risks as salient, too. In the heat of the moment, getting teased for driving safely and steadily may be weighed as a bigger risk than the chance of crashing.

Other perceived social risks might be asking someone on a date,

not conforming to the latest style trends, or standing up for a friend.

Yet the very latest research is also demonstrating that peer influence can drive more positive behaviours and outcomes – such as learning, exploration and prosocial behaviour, like volunteering.



A 2015 study by Choukas-Bradley *et al*, published in the *Journal of Youth Adolescence*, asked American schoolchildren aged 12-14 how likely they were to volunteer in different activities, such as helping to raise money for a community centre by participating in a car wash, or tutoring at an elementary school. If they were additionally aware that a popular and well-liked peer – signalled in the experiment by being friends with other cool kids and doing hobbies typically associated with high status – was very likely to volunteer, the children were more likely to say they would participate, too, particularly in public. But they also stated it in private, showing they had assimilated the norm.

From a behavioural science perspective, these new insights mean we can better tailor behavioural interventions to this age group. Messages informing them about peer behaviour, or from a popular or authoritative peer figure, are likely to be more effective and influential.

For example, a 2016 study by Paluck, Shepherd and Aronow, looking at which programmes reduced bullying and conflict in New Jersey schools, found that they tended to be most successful when more popular and highly connected pupils were involved in the campaign.

Implications

- Behavioural-change interventions are likely to be more effective if tailored and personalised towards different age groups
- Initiatives that draw on adolescent impulsiveness in search of a reward – or that use peer influence, particularly of popular, high-status peers – may be more effective
- Considering the context in which teenagers may be deciding could be key – are they alone or among peers?
- How information is framed could be crucial – highlighting the rewards is likely to be more effective than drawing attention to the downsides.

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Mind the gap

Companies employing more than 250 people now must, by law, declare their gender pay gap – and this includes a significant number of market research businesses. Jane Bainbridge reports

Inclusion and equality – whether in terms of gender, ethnicity or disability – have risen higher in our collective consciousness recently. From the post-Harvey Weinstein scandal #MeToo groundswell, and the more specific timeTo sexual harassment ad industry campaign, to better dialogue about mental health and the introduction of more explicit inclusion agendas in the workplace – it is being talked about, behavioural issues are being addressed and legislation introduced.

When the BBC was forced to publish the pay of its top presenters last year, few could have anticipated how quickly the story would shift from the rights and wrongs of public sector v commercial pay, to the staggering disparity between the salaries of men and women within the organisation – with the inevitable broader repercussions and discussions around gender pay gaps.

Since April last year, employers in Britain with more than 250 staff have been required, by law, to publish their gender pay-gap data. This has included mean and median averages, gender bonus gaps, and the proportions of men and women receiving bonuses and featuring in each quartile of an organisation's pay structure.

As part of the Market Research Society's annual review of agencies' financial performance, the gender pay-gap data for the larger agencies – based on their April 2018 financial returns – has been analysed by David Cahn, of Syngis Consulting.

Of the 10,500-plus organisations that published their gender pay information, 32 were market research companies – and, of those, 25 published additional explanatory text on their websites.

Cahn points to a few common themes

In most cases, the gender pay gap was seen as a consequence of having too few senior women



emerging from these additional texts, for example: most companies see the gender pay gap as part of the broader diversity and inclusion discourse; many companies were keen to stress that gender pay gap was not the same as equal pay; and most – but not all – firms expressed dissatisfaction at their current gap.

The unweighted gender pay-gap hourly rate 'mean of medians' for the 32 market research companies is worse than that for all 10,513 organisations – 13.0% v 9.3%. The gender pay-gap bonus 'mean of medians' is much worse – 28.3% v 5.0%, although Cahn says that bonuses are more widespread among the 32 market research firms, both for men and women.

Ahead of the game

"The particular thing that interested me was where a company took the trouble to split out its interviewer force – which is a particular characteristic of the market research industry. They were able to show, quite clearly, that with one group of people who, by definition, are not very well paid, and predominantly made up of women – and another group where it's mixed

– you get a much healthier pay gap," says Cahn. "Airlines have a similar issue.

"I felt that was a good thing in the sense that it would enable people to report this as they have to, but in such a way that they don't give misleadingly pessimistic figures. I think market research has a good story to tell about this, because its attitude to women has always been ahead of the game."

With several figures being reported, Cahn says most attention should be paid to the median. "It works better because, if you had a few very highly paid people, that would shove the mean up, but it wouldn't affect the median because you're still choosing the salary in the middle," he adds. "That's why the Office of National Statistics went to the median, and I saw examples of people's median being more realistic than their mean."

Cahn also argues for studying the data by pay quartiles: "If you analyse by quartile and separate out fieldworkers, you're not fiddling the figures – you're just getting a better fix on stuff you can do something about. Kate Andrews, of the Institute of Economic Affairs, pointed out that publishing this data incentivised managers not to employ people in lower ranks and graduates, because it tends to widen the gap – looking at it in quartiles is one way of not falling into that trap."

Among the market research agencies, Cahn gives special mention to NatCen for having one of the highest levels of female employment (65%) among agencies, employing both interviewers and office staff, and its mean (-5.0%) and median (-15.0%) gender gaps are positive.

NatCen's explanatory notes point out: "A significant proportion of our employees are social scientists and, in part, the median and mean negative pay gap is influenced by the high proportion of female staff we employ in these posts. Additionally, we engage a high proportion of female staff in support roles in our Brentwood office."

Cahn also highlights Ipsos Mori and Kantar Media. "Ipsos Mori has a commendable median gap (-0.9%), but its mean gap (11.7%) and its bonus gaps (mean 56.1%, median 50.3%), are – it feels – still far too high," he says in the report.

"Kantar Media has a similar return: median gap (-12.7%); mean gap (3.5%); bonus gaps (mean 41.6%, median 38.0%), though its level of female employment (29%) is one of the lowest. In the absence of specific qualitative feedback for Kantar Media (WPP offered a general overview without commenting on individual companies), one can only assume that Kantar Media women – though in a minority – out-earn men at all levels of the business."

Ben Page, CEO of Ipsos Mori, welcomes the need to report gender pay gaps because of the focus it puts on the issue, and the company has been looking at the data to try to identify where the problems occur.

Balanced board

"What we see is, we actually pay women slightly more than men until they're about 35 to 40," says Page. "What I'm trying to understand is why do I suddenly become prejudiced against women when they hit 35 to 40?"

"We do have more men in very senior roles, and that's where the salaries are highest. As with a lot of British business, that is at the root of the problem. I've readjusted the board so it's 50% men and women – and our Paris main board is balanced in terms of gender."

Cahn found that the market research businesses were committed to overall gender



equality and were consistently responding to the pay gaps by setting up working groups and appointing individuals to tackle not just gender, but also broader inclusion issues. This has been the case at Ipsos Mori, too.

“We’ve got a team of people looking at the gender pay gap, but also at diversity more generally. We’re looking at gender, ethnicity and there is some pressure to look at class,” says Page.

“Ipsos Mori has been relatively successful among the big companies in the past few years, and we’re not only successful because of gender diversity, but because of our diversity much more broadly. We’ve got 120 nationalities and ethnicities here, and it’s definitely a strength.”

Finding more diverse talent becomes most difficult when searching for very specific jobs, however.

“You want someone who’s a specialist in financial services research, or who’s got x years in shopper research – there will be more senior men than senior women available. How do you break out of that mould? That’s something we’re looking at,” Page explains.

“Every promotion and pay-rise round, we check to make sure men aren’t getting bigger pay rises than women. Because we don’t collect minute data on everybody, we don’t automatically know who has children – they’re not required to tell us. So there’s been some debate about collecting that, so we can

Guidance for closing the gender pay gap

Our natural bias is towards preserving the status quo – and with 95% of CEOs being white and male, the status quo does not help diversity in leadership teams. Ensuring women are on job shortlists has been an obvious place to start.

But if the shortlist for a job consists of three men and one woman, there’s statistically no chance of the woman being hired. This was the finding of research by Johnson, Hekman and Chan, published in the *Harvard Business Review*. If there are two women on the shortlist, the chance of a woman being hired increases to the more appropriate 50%. If it’s three women and one man, there’s a 67% chance a woman will be hired.

The researchers pointed out that, having just one woman in the pool of

finalists highlighted how different she was from the norm, and people tend to see it as risky to deviate from the norm. But they said “this ‘getting two in the pool’ effect represents an important first step for overcoming unconscious bias, and ushering in the racial and gender balance we want in organisations”.

These findings also suggest that companies adopting a strategy of scrapping all-male shortlists may not be doing enough. As the Behavioural Insights Team (BIT) points out, the ratio of one woman in four still sends the implicit message that a man is more appropriate for the job.

The BIT and the Government Equalities Office have published What Works guidance to help employers.

do the analysis properly.”

While gender pay data and gap calculations bring this topic to the fore, overcoming the numerous issues that have led to that gap require, as Page puts it, “hard graft” – working out policies and practices that mean women who take time off to have children aren’t penalised, and that the workforce feels fairly treated.

Some of the biggest gender pay gaps have been reported by larger American-owned businesses – most notably Gartner and Information Resources. However, Cahn thinks Gartner’s acquisition of CEB last year will “have a marked positive impact on its overall gender pay gap, as the two businesses have very different gender profiles”.

Work/life balance

Cahn’s analysis shows that, in most cases (17 out of 24 responses), having too few senior women – and, in particular, insufficient female representation in the top quartile of employees – was seen as the main cause of the gender pay gap. Organisations recognised that this was their responsibility, although some suggested the gender pay gap was positive, as it demonstrated the business was offering staff flexibility and work/life balance options, which may mean some women are on lower wages.

This is only the start. Many businesses have stated that they are committed to unconscious-bias training, inclusion teams, and more. The Market Research Society is currently developing a template, supported by an MRS webinar, which will set out how to gather, analyse and report gender pay rates to help research organisations.

Jane Frost, CEO of MRS, says: “If we are to be a sector that retains the best talent, we must address inequality. Evidence such as this is important to create the impetus to change. MRS committed to publish this data when our first inclusion research identified pay parity as one of the barriers to inclusion in the sector. We do know that the issues are much wider than this and, with the support of Lightspeed, which conducted previous MRS inclusion research, will be repeating our research later this year. We will also continue to publish our analysis of the government data annually.”

Further details of the organisations’ gender pay gaps will be published in the next Research Live Report, which will be online in December and a copy circulated with January’s *Impact*.

5

tips for... asking for a pay rise

- Do research – we’d all like to be paid more, but if you are going to ask for a pay rise, you need to know that it’s the market rate. Check online ads and, if you have a good relationship with a recruiter, ask their opinion. If you can, find out what other people at your level are paid. Make sure you have a good case.
- Make an appointment – don’t bring this up in the pub, car park, lift or loo. Ask for a meeting where you can discuss salary and progression (the two are often linked).
- Be prepared – be clear on the points you want to get across; make notes – refer to them; be concise, confident and deliberate.
- Know your outcome – what do you want to happen? A decision? Be realistic; the chances are your manager will have to refer to someone else, so accept that, but ask for a timeline.
- Don’t issue an ultimatum – it’s very hard to come back from that and, unless you are willing to follow through, this isn’t a great idea.

Sinead Hasson is founder and managing director of recruitment consultancy Hasson Associates

Towards a GDPR code of conduct for the research sector



Codes of conduct are set to be a game-changer under the General Data Protection Regulation (GDPR) and research associations across the EU – including the MRS – have embarked on an initiative to develop a comprehensive, practical and accessible GDPR code for the research and analytics sector. Realising the benefits of a code, especially one of wide application, will be pivotal for all types of businesses, especially micro, small and medium-sized organisations.

Roadmap for uncertain times

A GDPR research code will help the sector to maximise the opportunities of GDPR and more effectively apply the legislation in collecting and processing research participant data. Controllers and processors, who adhere to a code, will be able to use it to:

- Follow sector-specific tailored guidance on GDPR compliance requirements
- Address and identify their risky processing activities and understand the suitable mitigation measures
- Help them with cross-border data transfers outside the EU as the code can serve as an approved legal mechanism (together with binding legal commitments)
- Mitigate against enforcement action by a data protection authority, such as when they assess the amount of an administrative fine
- Signal to data subjects and regulators that their business is GDPR compliant
- Develop a competitive advantage over other suppliers with a quality mark for data controllers choosing suppliers.

Tailored content

Article 40 of GDPR encourages the drawing up of codes of conduct to help data controllers and processors demonstrate compliance. It envisages a wide, but tightly controlled, system based on co-regulation between data protection authorities and industry bodies.

Building on the EU Directive approach that encouraged establishing sector-specific data protection codes, it provides



significantly more detail about what must be included and the routes for approval.

In line with this new approach, there is a long and diverse list of areas that can be dealt with in a code, such as:

- Fair and transparent processing
- Legitimate interests pursued by controllers in specific contexts
- Collection of personal data
- Pseudonymisation of personal data
- Information provided to the public and to data subjects
- Exercise of the rights of data subjects
- Information provided to, and the protection of, children and the manner for parental consent
- Technical and organisational measures, including privacy by design and measures to ensure security of processing
- Notification of personal data breaches to supervisory authorities and communication of breaches to data subjects
- Data transfers outside the EU
- Procedures for resolving disputes between controllers and data subjects.

A harmonised approach will be particularly valuable for international research. The current hot topics engaging the minds of data protection officers and privacy champions working in the research sector are likely to be addressed in a code.

For example, what should be in privacy notices for participants, and what layering is appropriate? How do you determine if the research organisation is a controller or processor? What are the appropriate roles and responsibilities of parties in the research supply chain and how do you pseudonymise research datasets?

But above all, EU legislators and policy-makers have made it clear that the detail in the code must add value.

Regulators are not looking for a mere re-interpretation of GDPR but evidence that the sector promoting the code is giving added value for data protection compliance and data subjects. The code does not necessarily have to increase the legal requirements but certainly must not dilute or minimise them. In a sector historically

based on a bedrock of ethics and best practice, this should be easily demonstrable.

Extensive process for formal approval

Codes impacting on several member states are submitted to a lead data protection authority who, under the consistency mechanism, then submits the code to the European Data Protection Board (EDPB).

Once the code is considered to have appropriate safeguards, the EDPB will submit its opinion to the European Commission, which can validate and publicise it. Transparency is ensured by a code register – created and maintained by EDPB – involving monitoring by accredited bodies. Timely review and formal adoption will require commitment from all of the parties involved in the process.

Developing and participating in a GDPR code is not a soft option for the sector. Across the EU, self-regulation regimes are of mixed maturity and efficiency.

The code will require dedicated resources, comprehensive monitoring and may need significant capacity building by some associations and organisations. It is also likely to involve a lengthy process with extensive drafting exercises and encompassing wide consultation.

An open consultation process is critical to ensure that all relevant stakeholders, including not only research practitioners but also data subjects and privacy organisations, are meaningfully involved in discussions on the appropriate content and reach of the code.

Adhering to a code can work for your business

The code will help explain how GDPR applies in practice, and better enshrine and standardise research best practice across EU member states and beyond.

Adherence to the code will allow a research organisation to be more fully trusted by clients and help with cross-border transfers – all within a rigorously monitored framework.

So, keep in touch as MRS works with other research associations to adopt a robust, but tailored, GDPR code for the research sector.



Holding up the mirror

One of the great things about *Impact* magazine is the sheer variety of subjects, opinions and people it showcases. In so doing, it reflects the diversity of the research sector, and its ability to borrow and assimilate techniques and ideas from other disciplines.

I often describe researchers as being magpies, collecting and using ideas from the sciences and arts, adopting and adapting the newest techniques and technologies. As a profession, we grow and evolve through this voracious curiosity. Interesting fact: magpies are the only non-mammals to recognise themselves in a mirror (more of this later).

I cannot think of another sector where creative invention and scientific method intersect and flourish so fluidly.

Just look at the range of voices in *Impact* – from Rory Sutherland’s maverick take on advertising and behavioural science, to Matt Taylor’s shakedown of west-coast tech culture. We’ve also included a new section dedicated to data analytics – an addition, the importance of which cannot be overstated.

Hardly surprising that, from this rich brew, comes a concept such as ‘Intelligence Capital™’. Yes, the trademark belongs to MRS – it signifies the importance we attribute to it.

Business acknowledges the role of financial capital and human capital to

sustainable growth. Our proposal is that Intelligence Capital™ is the third critical component for successful companies – comprising, at its heart, real respect for the customer, based on actionable insight. Intelligence Capital™ includes an organisation’s ability to learn, its collective emotional intelligence, and its capacity to disrupt its own assumptions and processes to create change. Supported by our sponsor, Kantar, we aim to put a value on this third component, and articulate to financial directors and decision-makers a compelling business case for ongoing investment in research, insight and analytics.

A report on this initiative is due early next year, and it will be the first stepping stone in a longer campaign to demonstrate the value of this sector to business and brands.

Finally, coming back to magpies and their self-awareness, I return to the subject of inclusion. The MRS Delphi Group is currently developing a report on bias, which looks at what we know as a sector about avoiding bias in our research projects, and how we should apply this professional knowledge as managers and leaders. I am very much looking forward to reading what it has to say.

If you have an idea or a topic that you would like to see explored in *Impact* or in MRS’s various other initiatives, conferences and publications, please don’t hesitate to contact me.

Sector and MRS news

Policy

MRS has met the Information Commissioner’s Office (ICO) to highlight the need for research suppliers to name commissioning client data controllers at the outset of research projects. The ICO has referred the issue to the European Data Protection Board (EDPB), which intends to issue formal guidance on the determining of controllers and processors (and consider the impact on research) in autumn 2018.

Codeline

From 1 September, Codeline became an email-only advice service for MRS individual members and Accredited Company Partners. This enables us to continue to provide swift, reliable and free advice to help you interpret and implement the MRS Code of Conduct, while managing the higher volume of queries we have been receiving. Please email: codeline@mrs.org.uk

Inclusion

MRS has pledged to support the timeTo initiative spearheaded by the Advertising Association, NABS and WACL to tackle sexual harassment in the advertising and marketing communications sector. We will be incorporating their recommendations into our own corporate governance to safeguard our staff.

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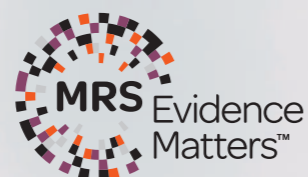
At Verve Talent we have developed a successful model of searching for talent. Research Jobfinder has been included in our recruitment mix for a number of years, its account managers are helpful, efficient, proactive and always looking for smarter ways to help us get the candidates we need.

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700+ live jobs | 13,500 jobseekers | 48,000 monthly views

Making the most of your membership

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

GDPR expertise



Access specialist research-focused resources to help you navigate GDPR

As a member, you get exclusive access to our In Brief series, designed by our data privacy experts to help you keep ahead of the regulation, and written in the context of the insight and research sector. There is also our general guidance on data protection and research, as well as FAQs, webinars and specialist training. We'll ensure you have the right interpretation of the regulation at your fingertips.

Improved know-how



Boost your brilliance with a wealth of e-books and articles, videos and case studies

You can be the expert in your organisation, thanks to two new online member resources. The Knowledge Centre features 40 business, brand and self-development e-books, plus regularly updated videos and articles. Also, access SAGE Research Methods, a vast online store of hundreds of journals, articles and case studies on business and social research. Now there's no excuse not to be top of your game.

Big discounts



Membership gives you up to 30% discounts on conferences, training and events

We want you to keep developing throughout your career, so we've designed a range of attractive discounts across all of the MRS commercial events, awards and training. This includes £150 off a regular one-day training course – almost a year's worth of membership. And, of course, there are plenty of events that are free for members, including speaker evenings, professional webinars and most regional events.

Access your benefits

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

www.mrs.org.uk/membership/benefits

Diary dates

Member events

MRS AGM
The 63rd Annual General Meeting of MRS members takes place at the MRS HQ in London.

4 October

Speaker evening: Humans vs Technology in Research
Discover how to get the right balance between human-based and tech-enabled approaches in research.

18 October

IJMR lecture: Chris Barnham
The *International Journal of Market Research* hosts its upcoming lecture, featuring Chris Barnham.

5 November

Professional webinar: Get Social
Tune in to hear how managers and leaders can use social media to get real business results.

15 November

Speaker evening: Using VR for Audience Engagement
Learn how virtual reality has moved from a niche tool to engaging mainstream audiences with sensory experiences and storytelling.

22 November

Professional webinars and speaker evenings are free for members.

For information on all MRS events go to www.mrs.org.uk/events



Conferences

Travel, Transport & Mobility
Discover the latest research findings that are shaping the future of travel, transport and mobility.

1 November

Financial Services Research

Hear cutting-edge insight from specialists within financial service providers, regulators and agencies.

15 November

Methodology in Context

Examine the genesis, practice and implications of methodologies that generate valuable consumer and citizen insight.

22 November

Kids & Youth Research

Boost your understanding of young consumers and improve how you build relationships with this audience.

24 January

Social Media Summit

Learn about harnessing social media to connect with consumers, understand their motivations and profit from their interactions.

7 February

Data Analytics & Insight Conference

Hear curated discussions on using multiple data sources and advanced analytics to deliver exceptional insight.

28 February

Awards ceremonies

MRS Awards Dinner
Attend the glittering highlight of the year to hear the award winners and dine with 1,000 sector notables.

3 December

Training highlights Essentials of Qualitative Research

Explore briefing, design, fieldwork, analysis and presentation.

16-18 October

Essentials of Quantitative Research

Discover data collection, sampling, analysis and presentation.

30 October – 1 November

Advanced Qualitative Practice

Learn the key psychological techniques to attain a new level of insight.

15 November (Day 1 of 5)

Advanced Semiotics Masterclass

Learn a range of semiotic applications and how to implement them.

21-22 November

Commercial Storytelling for Researchers

Accelerate your capabilities in commercial thinking and storytelling.

8 November (Day 1) & 15 November (Day 2)

7



Carl Miller is research director of the Centre for the Analysis of Social Media (CASM) at thinktank Demos. He is an expert in how social media is changing society and politics, and has written a book, *The Death of the Gods: the new global power grab*, published by Penguin Random House

1 What's been the most significant shift in power over the past 20 years?

The biggest shift is how power now touches us through digital technologies woven through our daily lives.

Technology acts like a camouflage for power, making it weird and unfamiliar. We know less about what influences our lives today than we did in the past.

2 Has the nature of power changed in our digital society?

Whether in forms that are dispersed or concentrated, and whether for good or bad, these new forms of power have something in common that older, visible, more recognisable forms typically do not – they are far less constrained by rules. When power operates through technology, it often breaks out of the cages we've built to control it. Bluntly, power in the digital age has gone wild.

3 Who has power that didn't before, and who has lost it?

When writing the book, I met people who had found astonishing new routes to power. They were all different, but had each found power freed from its usual bindings. They had taken on, or ignored, the rules, structures and organisations that were bigger, richer and more powerful than them, and were now changing the world. On the other hand, traditional institutions and centres of authority – mainstream politics, police

and the media – have been undermined. Some of these haven't adapted quickly enough, some can't adapt and, for others, it still isn't clear how they should adapt to the realities they now face.

4 Society is seen as more unequal than ever. How does social media influence that?

The tech giants are the most obvious concentrations of power created by the digital revolution. Markets don't work anymore, because now the impetus is towards the opposite: platform dominance. People joined Facebook because their friends were on it; they downloaded Skype because someone wanted to call them using it. You buy on Amazon because everything is available at a reasonable price. This creates not just inequalities of financial reward, but also of control. Google and Facebook between them account for 81% of the traffic to online news sites in the UK.

5 What role is there for market research and evidence?

Many of the technologies at the heart of these changes are causing the 'datafication' of social life. Huge, real-time, rich, linked datasets are being created, capturing what society has always done. It's the most important opportunity in social science for a generation – but the capacity to grasp this new opportunity is a form of power.

Data, compute power and the talent to make sense of it tend to collect into a small number of centres – and, most noticeably, within the tech giants.

6 You did many terrifying things in researching this book – what scared you the most?

The book begins with a knife being held to my throat, but that wasn't the scariest. That began when I met a man called Chris in a London pub. He showed me a video – of a torch shining on a piece of paper with his name written on it, and then a car blowing up. Chris was a dark-net hacker, and had become involved in the struggle for control of an assassination market. Over the next year, I followed his journey into that surreal, hidden world.

7 Did you end up feeling technology was a force for good or bad?

The question in the back of my mind was always: are we more powerful than before, or more controlled? I realised we are living through an onset of tremendous liberations and potent new forms of control at the same time. Technology is allowing the more perfect expression of those conflicting qualities that humans have always carried inside: the desire to dominate and control, and the potential to be brave and selfless. All these new forms of wild power are allowing liberation and control to happen more than ever.



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* Use discount code AUT18 at booking checkout.



mrs.org.uk/training-courses

“Insight has historically been a one-person team at easyJet, responsible for delivering the customer voice throughout the business. We therefore seek to work with agencies who understand our culture and mindset.

We believe in long-term partnerships, which is why we're delighted to celebrate our tenth anniversary of working continuously with Join the Dots this year.”

- **Danielle Wakeman,**
Head of Insight

easyJet

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jtd.mr/twentyyears



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