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Fresh start

The peculiarity of our academic year means that thanks to a childhood of education – extending into adulthood for some of us – autumn feels like a fresh start. Despite September/October falling into the final third of the calendar year, it remains firmly fixed in our psyche as the opportunity for a new beginning.

The summer's over: it's time to shine your shoes; sort your new bag; sharpen your pencils... and your brain. Even if educational institutions are a dim and distant memory, the 'back to school' mentality lingers. That resolve may even survive the heart-sinking moment you open your post-summer inbox.

In my family, one person is heading to university as a fresher and another is embarking on full-time employment. Hands up who can remember the exhaustion of their first job? The unrelenting morning alarm call, the commute, seven-plus hours of full-on concentration, the endless stream of new things to learn and do. After a month in my graduate training scheme, I remember turning to a colleague a couple of years older than me, and asking despairingly 'does it ever get less tiring?' 'No, you just get used to it,' was her somewhat unhelpful retort.

Writing about establishing a market research apprenticeship (p70) and talking to the trailblazers involved, it was particularly interesting to hear their experiences of hiring apprentices in other parts of their business. There are clearly important lessons for all employers to learn.

Even as exhausted 21-year-olds, graduates have usually experienced leaving home, finding local services, paying bills, and feeding themselves. Some valuable growing up has taken place. How much harder must it be for 18-year-olds? Only just out of the comparatively protective environments of secondary schools or further education colleges, they are probably still living at home and not yet having to fend for themselves in so many ways.

The market research industry now needs to prepare to support and nurture these teenagers.

The arguments for hiring apprentices are broad and increasingly compelling – stretching from the economic to the ethical. They include the apprenticeship levy for companies with an annual pay bill of more than £3m, the potentially smaller talent pool to select from following a post-Brexit immigration falloff (p12), and the need for more diverse workforces to ensure better representation across the market research sector.

Hiring 18-year-olds means employers must be ready for a more pastoral role. Supervising staff will need to be trained to manage the specific needs of young people with no work experience.

This will inevitably involve resource and effort from many parties, but the rewards are there for the taking. It's time for a fresh start.

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Planning for opportunism

How much of life is the product of simple luck rather than forward planning? That chance meeting; a misdialled telephone number; an encounter at a party you never planned to attend?

Answer honestly, and you'll be surprised how much in life is down to random chance. You can't really plan for luck. The best you can do is plan to be around when lucky happens. This halfway house between planning and randomness can best be called opportunism. "You have to go hunting every night. Maybe one night in 14 you'll get lucky... And you don't know what you're looking for, but you know it when you see it." Okay, that's a quotation from serial killer Son of Sam, and so not the most attractive source material. But *Mindhunter* came on the TV at the very moment I began typing this article, and it seemed too perfect a description of opportunism to waste.

People instinctively understand opportunism; I'm not sure businesses do. Young people are often ridiculed for experiencing extreme 'Fomo' – the fear of missing out. If you are a parent of teenage children, this can be a very annoying phobia indeed. You must stay sober on Friday and Saturday nights so you can drive the spoiled buggers to every party or gathering to which they are tangentially invited. But Fomo – especially when you are young – is a very rational response to a very real truth about the world.

If you were to ask your teenagers why they wanted to go out for yet another Saturday night, rather than taking the middle-aged option of staying at home with a takeaway, they would probably say: 'Well, I might get lucky.' The form this luck may take – new friends, new romantic interests, new gossip, new invitations to yet more bloody parties – is not defined. All that's certain is that none of these positive outcomes emerge if you stay at home. Over time, the process is highly non-linear: one opportunity breeds another. The fewer parties you attend, the fewer invitations you receive.

If you were a statistician, you might say that 'going out enjoys positive asymmetries'. You don't know in advance that a party is worthwhile, but you do know that nothing great is ever going to happen if you repeatedly stay indoors. Provided opportunity is net positive, maximising opportunity makes sense. Lots of things in life are like this. We do many things not because we have a specific

> **"You don't know in advance that a party is worthwhile, but you do know that nothing great is ever going to happen if you repeatedly stay indoors"**

objective in mind, but simply because they increase the chance of experiencing good fortune in some, as yet unspecified, way. In an uncertain world, you can't always plan for success, but you can plan for opportunity. The process may be neither exact nor definable or quantifiable – but it is still valuable.

What percentage of marketing works in this way? I would contend rather a lot. In large part, marketing will always work in unforeseen ways, simply by increasing the likelihood of unanticipated positive events. One way it will do this is through an extreme form of social visibility called fame. Being famous has no value in and of itself: its value arises obliquely because noticeable businesses/brands/teenagers are vastly more likely to experience unexpected upsides. Moreover, fame clearly pays off in multiple ways. If you are famous, your press releases will be taken more seriously, your chief executive's phone calls are more likely to be returned, and you attract better job applicants (and probably at a lower cost). People come to you first with good ideas, trust you more, and recommend you to others. Opportunity knocks, but only if it knows your address.

Yet what percentage of advertising and marketing is planned with an opportunistic intention in mind? I would say none. All business expenditure must be justified and evaluated instrumentally, not probabilistically. 'The purpose of X is to achieve Y.' Campaign X will be created, targeted and measured solely for its success at achieving predefined end Y. Anything it achieves, other than Y, does not count.

This means that advertising, as a whole, may be evaluated in completely the wrong way. The question to ask – the one teenagers understand unconsciously – is a Fomo question. Not 'what is the value of doing advertising?', but 'what is the cost of not doing it?'

Hence, the whole focus on efficiency that characterises digital advertising may be misplaced. As your teenage kids (and Son of Sam) understand instinctively, you can only be efficient at achieving something if you can define in advance what it is you intend to do. In the real world, this only applies some of the time. Half the money you spend on advertising may be wasted, just as, in retrospect, half the parties my kids go to are a waste of time. But, if you never go to a party that's a waste of time, you aren't going to enough parties.

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More than half (56%) of Chinese singles agree that being in a relationship makes them feel 'complete', compared with 43% in the US

(p14)

"The way people experience adulthood uncoupled has evolved, with a pivotal turn away from outdated assumptions. People are embracing the joys and freedoms of being single"

(p14)

"Every source [of data] has value, but all of it is a mosaic – no source of information has a monopoly on truth or accuracy. Combining all of them together is what gives strength"

(p10)

An estimated 740,000 Rohingya refugees have fled from Myanmar to Bangladesh since August 2017

(p10)

Domestic abuse lasts, on average, 25% longer in the UK's most remote rural areas than in urban areas

(p12)

"Brexit presents a recruitment opportunity for Europe-based companies and organisations. Amsterdam, Brussels, Geneva, Copenhagen and Stockholm all offer an English-speaking environment and geographical proximity, to compete for 'talent' with London"

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The bigger picture

Combining information from more than one source, including aerial imagery from drones and survey data, allowed Ipsos to assess the Rohingya refugee crisis for the World Bank. By Katie McQuater

Cox Bazaar, Rohingya Refugee Settlements

The Rohingya crisis is one of the world's fastest-growing refugee emergencies, with hundreds of thousands of people having fled from Myanmar to Bangladesh over the past two years to escape extreme violence. Most of the refugees have settled in the Cox's Bazar district of Bangladesh, living in very congested conditions, and increasing the pressure on existing infrastructure and facilities in an area that is also under threat from extreme weather conditions.

In February 2018, the World Bank asked Ipsos's risk analytics team, based in Washington, DC, to carry out an assessment of Cox's Bazar to locate the refugee population and help identify their needs. At the time, the population of Rohingya refugees in the area was around 650,000.

Taking place over a three-week period, the assessment project required data to be integrated from multiple origins, including drone imagery and a ground survey. "The question the Bangladesh government and other organisations, such as the World Bank, were trying to figure out was where these refugees are, what their needs are, and how they can help them and make the integration process a little easier," says lead researcher Mark Polyak, who runs the risk analytics division, part of Ipsos Public Affairs.

To understand rapidly where people were, how many of them were there and what potential problems they were facing, Ipsos used satellite imagery – acquired from drones run by the UN – to understand more about the scale of the displacement.

Using machine learning, Ipsos trained the system to understand what percentage of buildings in informal refugee settlements have unsafe conditions and estimate the number of people allocated to each tent. It then ran machine-learning algorithms against all the drone imagery to estimate the maximum number of settlements and to work out the maximum capacity of those settlements.

Hyperspectral imagery was also used by the team, to understand how much light was in a particular area and to identify which settlements had issues with unsafe lighting.

"The areas of unsafe lighting are the areas that have a significantly higher percentage of gender-based violence – sexual assault is much higher in those areas," says Polyak.

Drone imagery also allowed Ipsos to assess the conditions of roads and calculate the distance that refugees would have to travel from their settlements to access water, health and education facilities, and other services. This is helping the government and the World Bank to decide what areas to focus on and what type of investments are needed.
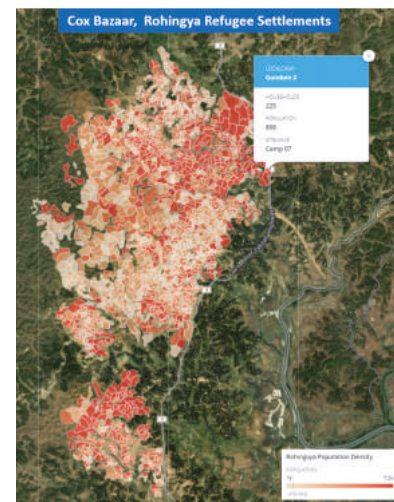
At the same time, a ground survey in the area spoke to the refugees and the host population to understand issues including access to jobs and wood for fuel. The result of refugees having no access to wood was highlighted by the analysis of the satellite imagery, says Polyak.

"A lot of the time, they would resort to using local forest wood to keep themselves warm, and that resulted in major deforestation in the area," says Polyak. "That was one of the unforeseen impacts of the situation, and something that we could draw to the attention of the government and World Bank, because this was a tertiary impact that was not anticipated at all."

While on-the-ground researchers faced some obstacles in terms of difficult terrain (in much of the area there are no roads, so the only access is via footpaths), the main challenges of the project lay in cross-checking information based on when it was received, and layering data from multiple sources to create a comprehensive picture, Polyak explains.

"If a survey of an area was done by the UN and the drone flight flew over the area three weeks later, how do you cross-check what people have said about housing conditions in this area against what you see from the drone flight?"

He adds: "The second challenge is having comprehensive access to the same data sources during the same or comparative timeframe. For example, flight conditions may have been better in one area.

"Dealing with some of the gaps and layering sources on top of each other to create a comprehensive picture is what's important. Every source has value. Every source has useful information, but all of it is a mosaic – no source of information has a monopoly on truth or accuracy. Combining all of them is what gives this strength."

Advances in machine-learning mean that this type of detailed analysis can be done in a much shorter timeframe than previously, according to Polyak.

"In the past, to know the issues with housing conditions, you needed somebody to look at satellite imagery – and over areas as big as Cox's Bazar, it would take weeks to months for even two or three people to look and identify structures. By running machine algorithms and AI over large groups of images, whether satellite or drone images, I can do in hours what used to take weeks."

The results of this work and subsequent analysis helped to inform the World Bank's strategic and operational planning in its response to the Rohingya crisis.

In March 2019, it approved a $165m grant – the third in a series of planned financings – to help the Bangladesh government provide services for Rohingya refugees, and to build and rehabilitate basic infrastructure. This will include constructing a water supply system, building and improving multipurpose cyclone shelters, roads, footpaths, drains, culverts and bridges, and installing solar street lights inside refugee camps.

- Since August 2017, an estimated 740,000 people from Myanmar have fled to Cox's Bazar, Bangladesh, because of extreme violence in Rakhine state
- Persecution has forced Rohingya people into Bangladesh for many years, with spikes in 1978, 1991–1992 and 2016
- As of March 2019, more than 900,000 stateless Rohingya refugees live in the Ukhiya and Teknaf Upazilas areas of Cox's Bazar.

Figures: United Nations Office for the Coordination of Humanitarian Affairs

False idyll

Domestic abuse lasts longer in rural areas, with stigma and shame preventing victims from seeking help and perceptions of rural communities masking the scale of the problem, writes The Buzzz's Alan Bowman

Domestic abuse may not hit the headlines like knife or gang-related violence, but – as a crime – it is growing at an alarming rate. According to the Femicide Census produced by Women's Aid in the UK, a woman was killed by her male partner or former partner every four days, on average, over the past 10 years.

This figure represents only the tragic tip of the iceberg, however. Underneath is a vast and complex range of abuse that involves coercion, controlling behaviour, stalking, ongoing mental abuse, financial control, and sexual control, in what has been summarised as 'intimate terrorism'. It involves male and female victims and,

as we discovered in our research, a significant proportion of victims who have lived like this for many years. Estimates show that one in four people in the UK today has experienced or witnessed domestic abuse as a child or adult (Refuge's 2017 annual report).

While the incidence rate for domestic abuse crimes classified by the Crime Survey for England and Wales is similar for urban and rural areas, the reporting rate – people who call the police or self-refer to support services – in rural areas is a little more than half of that for our towns and cities, according to the Dyfed-Powys Police Analysis in our report.

This is a stark finding in its own right and the implication for victims is huge. It means the data underpinning the commissioning of domestic abuse support services is fundamentally flawed. Consequently, rural services are being diverted to deal with the increasing caseloads as domestic abuse grows. As a result, rural victims are marooned without access to help, while the absence of support increases the likelihood of not reporting – and so the gap continues to grow.

Our research was carried out on behalf of the National Rural Crime Network (NRCN), which represents 30 police and

crime commissioners and police forces across England and Wales, as well as a wide range of other bodies with a deep interest in community safety and rural affairs. It highlights the hidden scale of the problem within rural communities.

Our investigation covered the entire system – from the planning and commissioning of support, its management and police interventions, to victims and survivors of domestic abuse.

One of the key insights was the impact that rural society and village life play in stopping victims from reaching out for help. In many places, we found a deeply patriarchal influence; in others, a refusal to believe 'that sort of thing goes on in a place as beautiful as this'.

Most commonly, we found that victims felt shame and stigma in admitting to friends and neighbours that they were being abused. This factor alone was twice as significant as in urban areas, and challenged our team's preconceptions of rural communities pulling together and looking out for each other. This may be true when it comes to the village fete, but is absent in the context of domestic abuse.

On an altogether more sinister level was evidence from a minority of cases that rural locations were being sought deliberately by perpetrators because they could use physical isolation as another weapon in their armoury. Control over your partner is much easier to establish when there are no neighbours or local transport.

The study took 14 months to complete, from literature review to a final opt-in online survey. Funding was initially provided by the NRCN, but contributions from seven police force areas helped to extend it. The project grew to become the most comprehensive and detailed study of domestic abuse undertaken in the UK. It shows how collaboration and sharing costs by public services can provide access to more relevant and broad-based findings than is achievable as a single body.

The Buzzz is a small independent consultancy and the scale of the study necessitated a collaborative approach. We built a team that could cover areas from Durham to Devon and Cornwall. Access to survivors was achieved through initial involvement with their service providers and caseworkers, so that we could reach a diverse sample of people with relevant stories to share.

Interviews typically lasted an hour and a half, and were conducted face to face in a safe environment. We used a storytelling narrative approach so that people could share their stories in a way that felt comfortable. Where necessary, we developed the detail with conversational questions, to help us understand the emotional impact, the drivers of abuse, coping mechanisms and, ultimately, how they left the relationship behind and the legacy of the experience.

We also ran mini focus groups within refuges or support meetings, including women aged 19 to 78, men, people who had changed their identity to avoid being tracked down, and those who had sought safety hundreds of miles from where the abuse happened. Their stories had a profound effect on everyone involved.

Commissioners of rural victims services, based in city or county halls, are now being encouraged to use data analysis in their strategic planning and to look for 'white spaces' on the map, where there are no reported incidents. It is likely that abuse is going on in these locations, with victims unable to act, or not knowing what help is available, and too ashamed to enlist the help of neighbours.

The full report is available to download at **ruralabuse.co.uk**

● **Alan Bowman is founder of The Buzzz**

Key findings

- Abuse lasts, on average, 25% longer in the most remote rural areas than in urban areas
- The policing response remains largely inadequate
- The more rural the setting, the higher the risk of harm
- Rurality and isolation are deliberately used as weapons by abusers
- Close-knit rural communities facilitate abuse by ignoring the issue
- Traditional, patriarchal communities control and subjugate women
- Support services are less available, less visible and less effective
- Retreating rural resources, cutbacks in transport, GP surgeries and rural police services – make help and escape harder
- The short-term, often hand-to-mouth funding model has created competing and fragmented service provision
- An endemic data bias against rural communities leads to gaps in response and support.

Table for one

Research from JWT Intelligence has explored the motivations of single people in China, the US and the UK, and found that despite events such as Singles' Day, single people in China are far less likely to treat themselves and are more pragmatic about relationships than their western peers.
By Emma Chiu

Not married? Congratulations. You are part of a growing and empowered community of singles who are increasingly content to live without a partner.

JWT Intelligence has delved into this group in its report *The Single Age*. Inspiration for the study came from observations made during recent research into 'The New Adulthood' (individuals aged between 30 and 45), which revealed that a substantial portion of the millennial demographic have built their lives around being joyfully single.

This isn't limited to millennials, however; the single lifestyle is finding favour across generations – as we found after surveying 3,000 people of different ages in the US, the UK and China.

Singlehood comes in many different shapes and sizes, so JWT Intelligence surveyed those who have been widowed and those who are divorced but have children, as well as young, free and single individuals. For a full representation of attitudes towards being single across wider society, the research also included those who are married or in a committed relationship.

While relationship status can be a highly personal and often touchy subject, we found that both single and committed respondents were eager to confide. Across the board, people were open about their experiences, and happy to have a platform to express their thoughts on singledom and the shifting values around relationship status.

In the east, despite heightened pressure to get married and start a family, Chinese singles are just as happy in their singlehood as their western counterparts. Almost two-thirds (63%) of single Chinese respondents said they love being single, compared with 60% in the UK and 64% in the US. That's not the same as preferring to be single, however. When asked whether they agreed with the statement 'I prefer being single to being in a relationship', China scored lowest at 50%, compared with 53% in the UK and 58% in the US.

The language used around being single in the east has traditionally been derogatory. In China, single females can be labelled 'leftover women' and Japanese singles are sometimes called 'loser dogs' – a term popularised by a bestselling book by Junko Sakai.

Meanwhile, the phrase 'bare branches' is used to describe Chinese men who can't find a wife because of the gender imbalance that resulted from the one-child policy. This is changing, and brands are helping to celebrate singledom through events such as Alibaba's Singles' Day – now the world's biggest one-day shopping event – inviting single people to enjoy their independent status.

Of the countries studied, the Chinese are by far the most traditional in their approach to relationships, possibly because society still pressures them to be that way. More than half (56%) of Chinese singles surveyed agreed that being in a relationship makes them feel 'complete', compared with 43% in the US.

At the same time, however, the Chinese approach to relationships is more pragmatic than romantic, with only 76% of single respondents there agreeing that they 'believe in love', compared with 85% of Americans and Brits.

Societal pressures and stigmas are less extreme in the west, where there has been a big cultural shift in the portrayal of singles in the media. *Love Island* might be all about coupling up, but every contestant enters the show as a strong single person – and, let's face it, they are likely to be single again soon.

Both singles and couples in the west have different ideas about money compared with their Chinese counterparts.

"Love Island might be all about coupling up, but every contestant enters the show as a strong single person – and, let's face it, they are likely to be single again soon"

'I spend to treat myself' is a motivation for just 40% of singles in China – only a slight difference from the 36% of Chinese respondents in couples who say they spend to treat themselves. In contrast, Brits and Americans face a bigger change in spending habits when they are in relationships: 64% of singles in the US and 61% in the UK say they spend to treat themselves, compared with only 39% and 43% respectively of those in couples.

The research found that the way people experience adulthood uncoupled has evolved, with a pivotal turn away from outdated assumptions. People are embracing the joys and freedoms of being single, rather than seeing it as a state in search of completion. As a result, consumers are pushing back against patronising marketing narratives that do not frame their experience as it is – something rewarding and fulfilling.

The rise of singles generally sits within a wider trend in which life stages, family units, and personal networks are becoming more fluid and individual. If one thing is certain, it's that one no longer needs to be the loneliest number.

● Wunderman Thompson's in-house data unit, Sonar, surveyed more than 3,000 respondents in the United States, the United Kingdom and China for the research. It surveyed the general population with a boost for single respondents to ensure it had sufficient base sizes to compare responses from single and committed respondents.

● **Emma Chiu is creative innovation director at JWT Intelligence at Wunderman Thompson**

It's easy to be single: 74% of US singles and 83% of Chinese singles agree it's now easier than ever to be single

Pets v children: 84% of US 18- to 34-year-olds agree that pets are like *de facto* children for some people and 71% agree that society places too much emphasis on the idea that you need to have a family to feel fulfilled

Media portrayals: Less than a quarter (22%) of US singles think the media portrayals of singlehood are happy; 44% think they are portrayed as lonely and 46% as independent

European ambitions

Will the UK experience 'brain drain' after Brexit, and could EU countries benefit as a result? By Katie McQuater

Freedom of movement, one of the most fundamental pillars of EU membership, has allowed citizens of countries in the bloc to live and work seamlessly wherever they wish. It has also been one of the key aspects of the Brexit debate since the beginning.

For UK businesses, there are concerns over how post-Brexit changes to immigration law could impact the UK's talent pool and skills in key sectors such as finance, health and technology. Employers in the UK could face tougher competition as other EU countries experience a positive effect on their labour markets.

ONS migration statistics from August 2019 point to immigration from the EU declining since 2016, although there are more EU citizens moving to the UK than leaving – with the exception of those from EU8 countries in Central and Eastern Europe.

As with many issues surrounding the departure from the EU, the question of how immigration policy will be affected remains foggy and many EU citizens have been in a state of limbo.

The introduction of the government's settlement scheme, which allows EU nationals to apply to continue living and working in the UK indefinitely after Brexit, provided some certainty but, according to recent figures, only 609,000 people have been granted 'settled status' and 342,600 'pre-settled status' out of an estimated 3.3m people. The scheme has also been heavily criticised by campaigners, partly because it lacks physical proof of status.

Other than a temporary scheme to be introduced in the event of a no-deal Brexit – allowing EU nationals arriving before the end of 2020 to apply to stay for three years – it is also unclear what Brexit means for EU nationals looking to move to the UK in future, potentially creating a longer-term workforce-planning headache for companies.

Over half of businesses believe the country is at risk of a brain drain after Brexit, with many particularly worried about a shortage of tech skills, according to research commissioned by software firm Salesforce.

Commenting on the August immigration statistics, Matthew Fell, chief UK policy director at the CBI, said skills shortages are worsening as a result of the downward trend in EU migration coupled with record low unemployment.

"Business understands that free movement is ending, but it marks a huge change in the way firms access skills and labour. They'll need proper time to adapt to a new system," he added.

The struggle for talent

While impossible to predict the long-term ramifications for the UK labour market, and hiring, recruitment and staff retention outside of EU membership, what is known is that business likes certainty and any disruption is likely to be keenly felt.

For market research, an industry that struggles to attract new talent, the prospect of the pool of potential candidates becoming smaller is unsettling. "There hasn't ever been a sufficient supply of talent for the industry," says Liz Norman, founder of Elizabeth Norman International, which specialises in recruitment for market research, data and analytics. "The industry is a global one and we need individuals who have first-hand experience of markets and consumers in other countries."

Norman recently looked back on researchers the company placed 16 years ago into UK roles – 26% are now working in another country. "That reflects just how much researchers have moved around globally in the past; anything that restricts that is of serious concern," she says.

Jem Fawcus, group chief executive at insight agency Firefish, agrees, saying that Brexit is only compounding an existing issue. "The fight for good talent is harder than it's ever been – there's a huge amount of competition."

An agile working policy allows Firefish employees to work remotely, so it has staff based around the UK, European nationals who work in their country of origin, and UK nationals in other parts of the EU, and Brexit adds a layer of complexity in managing this, says Fawcus. Historically, the agency has had a substantial proportion of EU candidates for its paid internship programme, but this has dropped recently. He adds: "People don't feel welcome – they're not confident about what's going to happen, so Britain is a less attractive place for that."

This unease is also reflected in research from the Chartered Institute of Personnel and Development that, in autumn 2018, found around half (48%) of employers of EU nationals reported an increase in their EU workforce expressing insecurity about their jobs as a result of Brexit. The publication of the EU settlement toolkit did little to quell employers' fears – only 28% said it has helped their confidence in retaining EU nationals.

"A huge element of this is the emotional turmoil it causes – it's very difficult to quantify," says Fawcus.

European prospects

Aside from the uncertainty facing people who live and work in the UK at the moment, it is also unclear what longer term impact Brexit could have if there are fewer skilled EU professionals moving here. Olga Siemers, lecturer in public policy at King's College London, who is embarking on a research project on the issue, says this is more of a concern.

"A number of examples of political changes from other countries (such as an election of a new president with a different political agenda), have resulted in a discussion that the 'best and brightest' are going to leave. In fact, some are leaving while many are staying because of practical reasons not related to politics. So, a scenario where high-skilled EU citizens stop coming to the post-Brexit UK (or this number is reduced) is much more concerning than the outmigration of those already based in the UK."

One possible consequence of talent flowing out of the UK, or the country being less attractive to EU talent in future, is that other parts of Europe could see a boost, says Siemers.

"Brexit presents an additional recruitment opportunity for Europe-based companies and organisations, especially, with English as a working language. Amsterdam, Brussels, Geneva, Copenhagen and Stockholm are cities with large expatriate communities that offer an English-speaking environment, geographical proximity, and compete for 'talent' with London."

Mapping the nation

Conducted once a decade, the census maps the population and provides vital insight for researchers and the government, but may soon cease to exist in its current form. Katie McQuater **explores the past, present and future of the national survey**

The first census in Britain was conducted in the Gaelic kingdom of Dalriada, on the west coast of Scotland, in the seventh century. *Senchus fer n-Alban* (The history of the men of Scotland) differed vastly from modern censuses in that its aim was to gather records for military and tax purposes, not to inform statistics about the nation.

Better known is the next effort to record the population – the Domesday Book, commissioned by William the Conqueror in 1086. Again, the survey was taken to determine what tax revenue the king could extract from his subjects.

More than 700 years later, after over-population fears were stoked when Thomas Malthus published his *Essay on the Principle of Population*, the first modern census for England and Wales was conducted in 1801. In the UK, the census has taken place every decade since, with only one exception during World War II.

Today, censuses do more than simply count the population. They offer the most detailed snapshot of a country at a given point in time, providing data that informs decisions and planning by local authorities and governments in fundamental areas such as housing and transport. They are also used by researchers and businesses to understand society and make decisions.

"They are vital," says David Hussey, director of statistics at the National Centre for Social Research (NatCen). "In social research, it's important for our surveys to get really accurate estimates for whatever

we're measuring, and census data is vital for the sampling and the weighting stages."

Census data is particularly valuable for researchers looking at details beyond age and sex at local authority level and above, as it includes more detailed information. For NatCen's face-to-face surveys, such as British Social Attitudes Survey and the Health Survey for England, it uses the census for stratification – to order a sample before it is drawn.

One example of how census data is used in sampling is when researchers are interested in bespoke areas in and around cities that are not necessarily defined by groups, local authorities or a region. "The only way we know what those cities look like, particularly in terms of age and gender, is to build up census data from its lowest level, which is output area level – typically 150 households," Hussey explains.

Independent demographer Piers Elias agrees that the census is key, particularly when it comes to ethnicity data. "It's the main source for ethnicity and – even though it's only once every 10 years – there is no other source that covers everyone in that sort of detail. The levels of change also tend to stay in the same areas – an area of high ethnicity in 2011 will probably be the same area in 2021."

Data on areas smaller than local authority level is crucial for councils allocating funding, and making decisions as wide-ranging as where to supply public health workers to planning bus routes, adds Elias.

> "Even though the census is only once every 10 years, there is no other source that covers everyone in that sort of detail"
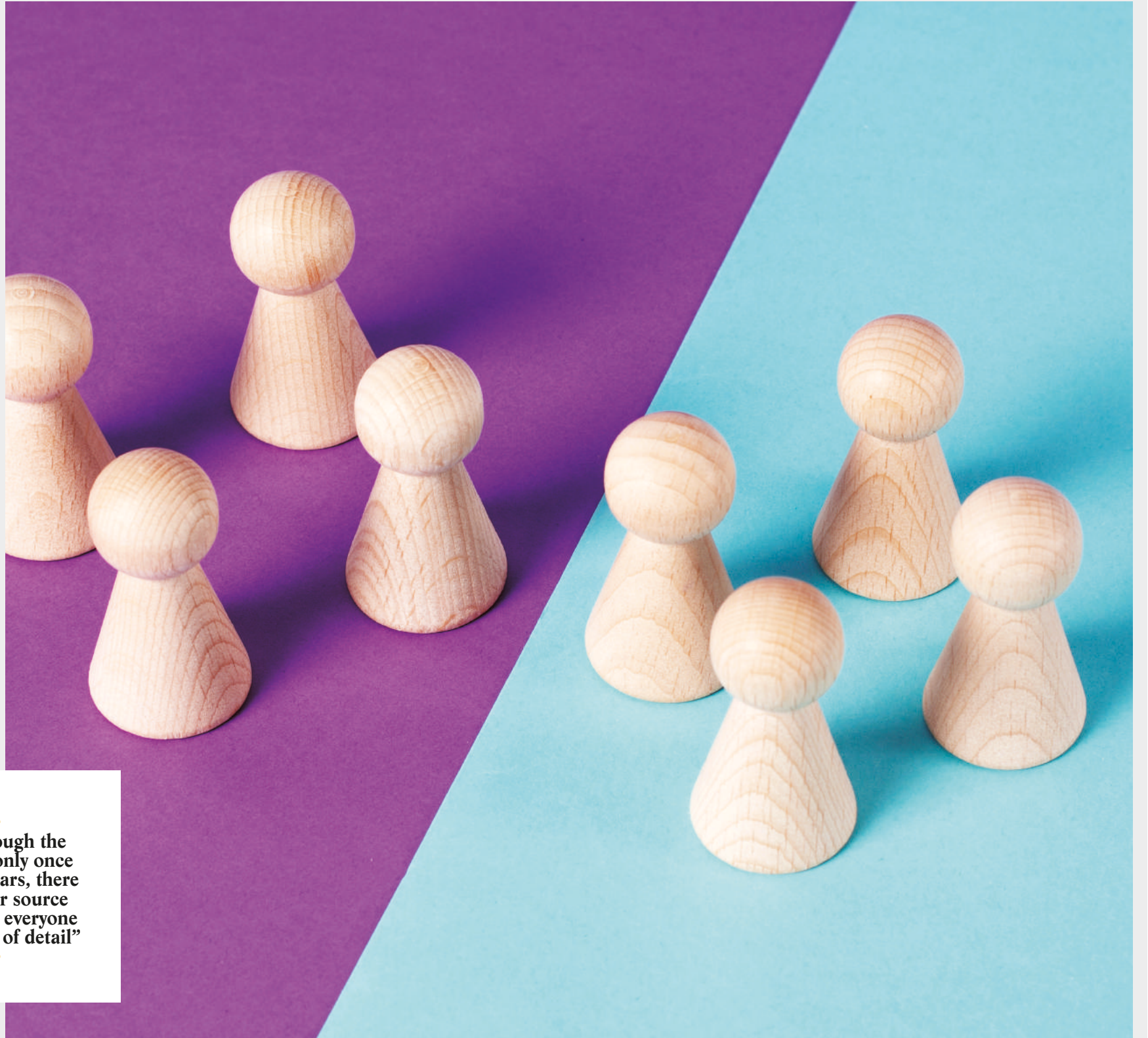
Frances Darlington-Pollock, lecturer in population geography at the University of Liverpool, uses census data in her work to understand inequalities and the differences in migration patterns. "Particularly with Brexit, and all this uncertainty, we know there are differences in the way in which people move house," she says. "Some move because of a favourable change in their circumstances; others remain trapped in an area they would rather leave. Using census data and linking information about the deprivation of an area allows you to understand how people move.

"That's crucial for planning – it matters for where you put schools and what types of health services you need. Without census data, you can't do that."

Navigational issues

One of the obvious limitations of a decennial census is its frequency.

"Census data is a little inflexible because, by the time you get to 2019 – when the previous census was in 2011 – that's quite a long time ago. Sometimes, you just have to bite the bullet and say 'this is the best information we've got'," says Hussey, who adds that ethnicity data is one specific example of this.

"An improvement would be if there was more up-to-date information available, but, of course, the trade-off is in the quality and accuracy versus the timeliness – and there's always going to be a trade-off there."

For Darlington-Pollock, it's not the 10-year gap that causes issues, but rather the lag in publishing the different types of data. While doing her PhD, she needed the Sample of Anonymised Records (SAR) – "census microdata" that gives the full breadth of census questions for a small percentage of the population. "That wasn't released until the middle to end of 2014, so you're waiting quite a long time – because it is such a high standard, they have to make sure it's confidential and secure," she says.

"That delay is a problem. It's something I know the Office for National Statistics (ONS) is working to address, but it's a huge dataset, so it's a big undertaking."

The microdata is also useful for market researchers, says Corrine Moy, global vice-president of marketing science at GfK. "The SAR is a great source of data for understanding person-level relationships and doing more in-depth analysis."

One census blind spot is how much people earn, because it is deemed too sensitive to ask about, although the ONS is looking at supplying the information from administrative data. Income would be a "really useful addition" for the commercial research world, says Moy. "To profile individuals, we often use the SAR. We would typically use this dataset to obtain profiles of certain populations – for example, mothers with kids under five. The ability to include income in this profiling would be valuable," she adds.

In the context of the United Kingdom, the 'census' isn't a single survey; devolved nations carry out their own censuses. So, although it happens on the same day, it involves three surveys run by the ONS in England and Wales, the National Records of Scotland (NRS) and the Northern Ireland Statistics and Research Agency (Nisra).

"The national statistician has responsibility for providing the UK-wide population estimates and we undertake that through a body called the UK census committee, where we meet with the head of the NRS and head of Nisra," says Iain Bell, deputy national statistician for population and public policy at the ONS, and the senior officer responsible for the census transformation programme.

"We meet every quarter to make sure we're moving forward together and harmonising where we can, while still respecting the needs of different parts of the country."

Hard questions

Devolution can pose challenges for researchers, however. "It does make working with census data a bit challenging," says Hussey. "It just takes longer, and the same thing is called something different; there is no such thing as a 'lower super output area' in Scotland – it's called a 'data zone'."

With such national significance, the census affects everybody, so it's not

> "An improvement would be if there was more up-to-date information available, but the trade-off is in the quality and accuracy versus the timeliness"

surprising that it attracts its fair share of public interest – and occasional controversy – over what is being asked. Gender identity is the current area of interest. While exact wording is yet to be determined, the 2021 census in England and Wales, and the Scottish census will ask about gender identity and sexual orientation for the first time.

In the US, the 2020 census was at the centre of a political row after the Trump administration declared it would ask respondents if they are US citizens, provoking criticism from human rights groups and businesses. The question was dropped after a Supreme Court ruling, but the President said the government would collect the data using information already held. The issue around asking about citizenship was that it would

negatively affect turnout, highlighting a key issue: censuses must find the right balance between accuracy and response rate – particularly given their longevity and influence.

In the UK, the census undergoes rigorous consultation and testing to ensure questions are asked sensitively and only if necessary. The ONS looks at the topics covered – determined by the areas of highest user need – as well as how questions are worded.

Censuses are costly affairs that require large amounts of resources. So, in recent years, many countries have begun examining how to source information without relying solely on the census, looking to administrative data already held by governments. In some cases, this is replacing decennial surveys altogether.

Sweden, for example, no longer conducts a census, but holds data on its population register, while – in France – a partial census is carried out annually, and the results published as averages over five years. Not only do alternative census approaches lessen the burden on citizens, they could also give more up-to-date information.

This need to adapt is the focus of the ONS's census transformation programme; 220 years after the first census, the 2021 survey could be the last of its kind.

"As part of the wider Census Data Collection and Transformation Programme, using data-sharing provisions in the Data Economy Act, ONS is exploring how administrative data could be used to replace a

Learning from Africa

Censuses in Africa face unique challenges and offer insights for statistics experts elsewhere. We spoke to Sophie Elfar and Garnett Compton from the ONS international development team to find out more.

"The census is probably more important in Africa because there aren't a lot of other data sources available," says Compton, who works at UNECA's African Centre for Statistics in Addis Ababa. "It not only provides the characteristics of your population and housing, but covers a lot of other topics – such as births, because there isn't a standard civil registration system. It does more than western censuses."

In Ghana, Elfar, strategic adviser to the Ghana Statistical Service, says census data is particularly important for sharing evidence with development partners. "Without good data, there's a risk that marginalised groups become invisible and are not included in national development programmes. Without good data, they don't have a voice."

For its next census in 2020, Ghana, like several other African countries, is using handheld tablets for the first time. "We're working with international development partners and other national statistics institutes to see if we can use their tablets and return them after our own census," says Elfar. "That's a mammoth task."

UK census teams can learn a lot from Africa, says Compton. "The UK census plans, developments and methods are shared with countries that do similar censuses. You don't get a completely fresh look at your census, whereas – when you try to do things in Africa – it gives you the opportunity to say 'maybe we should look at that again', or to clarify why you are doing what you're doing."

> "You get a split between traditional census users and people who are more on the side of big data, but many people see the value in both"

traditional decennial census after 2021," says Bell.

"What the census does is really two things: the first is to give us the population estimates in detail, down to geographic level; and the second is to give us a description of society today, through all the other questions, such as equalities, housing, travel to work, types of work, health. Our research programme is looking at both aspects."

In June 2019, the ONS published an update on its work on the new system of population and migration estimates, looking at the administrative data it has from government departments and how well it could estimate the population from that. It was largely successful in reducing the over-coverage seen in previous research. "We know how to deal with under-coverage – and the level of under-coverage is similar, if not slightly better, for some ages than the level of the raw census data," says Bell.

But, he adds: "The big task is still where would we get all the information for all the other characteristics in the census? We've got much more research to do there."

The aim of the programme is to publish a recommendation in 2023 on the future of the census. The National Records of

Scotland (NRS), which is responsible for Scotland's census, has also been exploring the future of the country's socio-demographic statistics.

"The census provides incredibly detailed and valuable information, but it does only happen once every 10 years and involves huge effort," says Amy Wilson, head of Scotland's Census 2021.

"For 2021, we concluded that the best way to do this is to carry out a country-wide data collection, but we will be using some administrative statistics to help us plan and process the census.

"Going forward, we will continue to look at whether our current model is the best – and most efficient – way to deliver high-quality data, or whether there are different ways in which we could meet those needs."

Direction of travel
Using government data for information about the population is no simple task, however. "There are all sorts of problems with data sources that aren't designed to count people – they are designed to administer a particular set of people," says Elias: "The worry with not having a census is that you'll have no idea, really, when things are going in the wrong direction."

Darlington-Pollock adds that it's important for researchers to remember the value of the census: "Even when we've got all these amazing new forms of data, the census is there and offers something additional to that. You definitely get a split between people who are traditional census users and people who are more on the side of big data, but I think many people see the value of both."

The census maps out the people of the country, acting as a baseline grid that serves multiple purposes, but this is really just the starting point. As Bell says, the value of the census is in how it is used. "The estimate of the population and describing the social condition of the country is not an end in itself – it's about the information that it gives people in local authorities and central government, and to employers wanting to know if they're reflecting the diversity of the local area in their workplace. The importance is really in those decisions."

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High–powered plants

Cannabidiol is being hailed as a wonder treatment for a variety of conditions – but how should brands approach this industry, which is invariably described as the new 'wild west'? By Tim Phillips

There is a metaphor that pops up consistently when discussing the market for legal cannabis and cannabidiol (CBD) products. "You're looking at this completely wild west industry, and the big players don't have a grip on it at all," says Joseph Oliver, co-founder of lifestyle brand LDN CBD.

"Regulation is absolutely needed in the industry. It's like the frontier and, unfortunately, there are too many cowboys," agrees Carl Boon, the managing director of retailer CBD Ultra.

If, at this point, you are wondering what CBD actually is, you're in the minority. Research by tech-based market research firm GlobalWebIndex finds that 64% of US internet users – and 51% in the UK – would consider using CBD-infused products.

CBD can be derived from cannabis plants or their cousin, the hemp plant. Unlike tetrahydrocannabinol (THC), the other major compound in cannabis, CBD is not psychoactive. There is little formal scientific research into the effect of CBD, but, anecdotally, users report feelings of relaxation and wellbeing. It is often bought as an anxiety treatment and a pain reliever.

CBD is also creating profound feelings of wellbeing in many R&D and product development departments. A naturally derived substance that few people had heard of at the beginning of the decade, which can be extracted as a by-product of an agricultural process, with few known side effects, and which capitalises on more or less every health trend of the past decade, CBD seems like a magic oil. It's why the Brightfield Group predicts worldwide CBD sales will climb from $591m in 2018 to $22bn by 2022. That's a compound growth rate of 147% – which would make it larger than the (already high-growth) global legal cannabis industry. The CBD beauty product market, says Brightfield, will be worth $290m in 2019.

"CBD seems like a magic oil. It's why the Brightfield Group predicts worldwide CBD sales will climb from $591m in 2018 to $22bn by 2022 –a compound growth rate of 147%"

"Most people who have tried CBD think it's effective for relieving symptoms of mental and physical ailments, but are unable to identify the correct minimum doses to do that"

In the UK, YouGov research for the Centre for Medicinal Cannabis found that the CBD market was three to six times larger than previous estimates, with 1.3 million UK consumers spending more than £300m per year on CBD products. If accurate, these figures would make the market bigger than the UK vitamin D (£145m) and vitamin C markets (£119m) combined, and larger than the entire existing supplement market by 2025.

In March 2019, the first Hemp & CBD Expo, at the National Exhibition Centre, had 110 exhibitors and 5,121 visitors. The September follow-up expects to attract 160 exhibitors and 8,000 visitors.

In the US, where the market is more mature thanks to cannabis legalisation in many states, Green Entrepreneur reports that sales of CBD gummies (the most popular way to consume the product) have grown 925% in a year, with a particular sales bump on Valentine's weekend.

Chase Buckle, trends manager at GlobalWebIndex – which recently surveyed representative samples of internet users in the US and the UK about their attitudes to CBD (see box, p28, 'Who uses CBD?') – has found another reason to love CBD: its allure crosses traditional demographic and category

boundaries. "If you look at our research, and other research as well, you'll see that the appeal isn't really for a specific group. It's really across all age groups. It straddles the medical industry and the wellness industry, and those two things cover such a broad age spectrum," Buckle says.

Science still understands little about CBD; the human endocannabinoid system was only discovered in the 1990s, by Israeli researcher Dr Raphael Mechoulam. The projections for CBD are such that it's easy to see why cowboys and big brands would be attracted to it.

If CBD and other products associated with hemp and cannabis are to achieve this growth – and sustain it – though, suppliers and regulators will need to understand why people want it, how they will use it, and how to control its quality. Brands getting involved will also need to explain what it does and how it does it, in a way that consumers understand – assuming the cowboys don't cause a backlash first.

GlobalWebIndex's research shows a remarkable level of trust in CBD among users, perhaps because the conditions it is associated with – chronic pain,

anxiety, insomnia, arthritis – cause people to search for new solutions.

"At the moment, people buy into the claims of companies, but they don't really know what they're doing," Buckle warns. "Most people who have tried CBD think it's effective for relieving symptoms of mental and physical ailments, but are unable to identify the correct minimum doses to do that."

A history of tonics

If history is our guide, humans have been open to new products that promise to ease our pain for a long time. What Melissa Bane, managing director for strategic insights consultancy Grail Insights UK, calls the "mood management industry" (see adjacent box) has, over the years, embraced many innovations that make any current CBD or legal cannabis controversy seem tame. We are accustomed to the highly successful – at least in its messaging – categorisation of substances that the war on drugs created from the 1980s onwards, but these red lines are a relatively recent phenomenon.

For example, the Pan-Am in-flight menu from 1950 offered tired passengers a benzedrine inhaler to pep them up. Fifty years earlier, Vin Mariani was a wildly popular coca-based tonic wine that 'nourishes, fortifies, refreshes, strengthens the entire system'. It was espoused by (among others) Émile Zola, Thomas Edison and Pope Leo XIII, whose testimony and picture appeared in the company's advertising. The Pope was so impressed with his tonic that he awarded its inventor a Vatican gold medal.

In the UK, Stickney and Poor's Paregoric was widely used to help newborns and adults get to sleep. A five-day-old baby's dose would be five drops, with a teaspoonful for an adult. At the beginning of the 20th century, meanwhile, the Sears-Roebuck catalogue offered a cure-all patent medicine, sold in presentation kits for $1.50, containing a syringe and instructions so that middle-class Americans could learn to inject it, 'the efficient dose being very small.'

It's hardly surprising that Vin Mariani would sustain the Pope through a particularly long Latin mass, because it contained 6mg of cocaine per fluid ounce, so a glass had approximately the same stimulant effect as a line of coke. Newborns dosed with the paregoric would have had no trouble dropping off, but it's more surprising to our sensibilities that they ever woke up. As well as containing as much alcohol as whisky, its other active ingredient was opium.

Both these brands have been forgotten. Not so Bayer's patent medicine. Its brand name survives, though you won't find it in mail order catalogues any more: Heroin.

Mood management

"If you look at this more broadly as a mood management category, which is how we define it," says Melissa Bane, at Grail Insights, *"we would include not just tobacco and pharma, but sugar."*

These categories – as well as supplements, make-up and health food – are separate from a brand manager's standpoint, says Bane. From a consumer's point of view, however, they are the same in one important aspect: all the products are used to make us feel a bit better.

Grail Insights surveyed 1,000 people in the US – and recently repeated the research in the UK – about CBD, to come up with 10 recommendations for brands. It found that: two out of three CBD users have switched from a traditional product, whatever the product category. Two out of five people with insomnia who have tried CBD have given up their insomnia medicine, and use is high among smokers and alcohol drinkers. Among drinkers, relaxation comes with fewer calories. In the UK research, one in three respondents who used CBD claimed they were doing so to cut down on, or give up, cigarettes.

But is this working? One clue as to how CBD is lightening the mood is that users find out about it mostly through recommendation, according to Grail. "Friends and family are by far the largest referral source," says Bane. "In the US, we even saw that 10% of people who've tried CBD are getting it through gifts. This is not just word of mouth – people are sharing it and gifting it to friends."

The CBD Revolution: top 10 reasons big pharma and 'mood management' brands should brace for impact can be found at **grailinsights.com/whatwethink/the-cbd-revolution**

Who uses CBD?

GlobalWebIndex performed two surveys, from January to May 2019, among internet users in the UK and US on attitudes to CBD, cannabis and related issues. Among its findings were:

- Two out of three US internet users are regularly practising some type of alternative health or wellness routine, many of which are associated with stress relief. The most popular of these are using herbal supplements (29%), essential oils (27%) and meditation (24%)
- 54% of US internet users agree that the claims of CBD providers are 'trustworthy', while only 48% feel the same way about pharma. And 41% of UK internet users trust the claims of CBD companies, while 44% trust pharma
- Three out of four users would recommend CBD to friends or family
- 55% of US consumers who would use CBD are motivated by reducing stress
- Among US CBD users, 85% believe it to be effective for physical ailments and 84% believe it's effective for mental health symptoms
- 40% of US internet users say they are 'knowledgeable' about correct CBD dosage, but only 7% could correctly identify the minimal oral dosage required to effectively treat anxiety
- 30% of US internet users consider themselves knowledgeable about how the FDA regulates CBD products, and only 14% of UK internet users know how the MHRA regulates CBD.

Grey areas

These historical mood managers would now be illegal, but CBD and legal cannabis regulation (in the US) has been travelling in the opposite direction, gradually dissociating itself from the illegal drug market and its connotations. This has created an inconsistent regulatory mess that discourages many responsible companies and cedes a proportion of the market to cowboys, who are prepared to satisfy some of the pent-up demand.

In the US, Congress legalised growing hemp and its derivatives, such as CBD, in the 2018 farm bill, providing financial aid to stimulate hemp's transition into a commodity crop. Although hemp-derived CBD is now legal to sell, CBD derived from marijuana is still prohibited by federal law (though not in many state laws, as long as it is sold through a supplier of cannabis products).

The Food and Drug Administration (FDA), however, does not yet have a regulatory framework for CBD, which means that ingestible CBD – rather than oils or creams –are a legal grey area. With only around 300 FDA agents for the entire country, however, suppliers are unlikely to have their door kicked down any time soon. Even so, it is enough to make large brands wary.

In October 2018, for example, Coca-Cola (whose product, lest we forget, once contained 9mg of cocaine per glass), distanced itself from speculation that it was exploring a CBD-based beverage. In May 2019, Mondelēz chief executive Dirk Van de Put told CNBC: "Yes, we're getting ready, but we obviously want to stay within what is legal and play it the right way."

In both the US and the UK, the lack of scientific knowledge about the dosage and effects of CBD and legal cannabis mean that products are years from being regulated as medicines. That doesn't stop overzealous consumers from assuming that they can cure or treat hundreds of conditions, or a few overenthusiastic salespeople from marketing it in that way on social media.

In the UK, it is not permitted to claim that CBD acts as a medical treatment and, from 2015 to June 2019, the Medicines and Healthcare products Regulatory Agency (MHRA) investigated more than 180 complaints of mis-selling. The multi-level marketing (MLM) vendor HempWorx is an interesting example. The devolved nature of MLM meant some salespeople ignored guidance and claimed that CBD treats diseases from multiple sclerosis to cancer, suggesting it as an alternative to traditional treatments. In 2018, the website Truth in Advertising investigated HempWorx and published these sales messages. In response, the company recruited a director of compliance, removed many of the claims its salespeople were making, and put in place

> "CBD and legal cannabis regulation (in the US) has been dissociating itself from the illegal drug market. This has created an inconsistent regulatory mess that discourages many responsible companies"

"aggressive" measures to ensure compliance.

However closely the claims of industry salespeople are regulated – and however much we learn about the effectiveness of the active ingredients – there is also a problem of product quality in the industry, as demand for the ingredients exceeds supply.

In the UK, the Centre for Medical Cannabis recently tested 30 CBD products and found that 45% had measurable levels of THC, making them illegal to sell. Seven of the products contained dichloromethane, a solvent, at levels above food-safety limits. One product bought in a high-street pharmacy had no CBD in it at all, and three out of five of the products in the tests had levels of CBD that were more than 10% outside the amount advertised on the bottle.

Mainstream involvement

Given these structural problems, one might wonder why there is a market for CBD at all – but trusted brands such as Ben & Jerry's are promising imminent product launches. The company has been packaging the counterculture for mainstream consumption for years, but it is owned by Unilever, a firm that doesn't take risks with compliance. However, a recent post on its official website said: 'You probably already know that we're fans of all things groovy... So it's no surprise that we can't wait to get into the latest food trend: cannabidiol, or CBD. We are committed to bringing CBD-infused ice cream to your freezer as soon as it's legalised at the federal level.'

The reason, we must conclude, is that CBD and legal cannabis are unique products. They promise to be the perfect solution for much of what ails Western culture. If we are in pain, we hope they will take the pain away; if we are stressed, we hope they will relax us; if we are depressed, we want them to lift our mood; and if we pay a high cost for healthcare to companies we despise, then maybe they can help us avoid punitive costs, as well as the horror of the opioid epidemic. This, delivered in a single ice cream, is quite a package.

Who doesn't want this to be true? The scale of the 'anxiety economy', for example, has created a variety of ways by which consumers choose to cope. In the US, 40m adults now suffer from an anxiety disorder, according to the Anxiety and Depression Association of America. Also in the US, economists Anne Case and Angus Deaton have found that life expectancy among older, non-college-educated people is falling – the first time this has occurred. Their work shows that this is because of what they call 'deaths of despair': suicide, alcoholism, dependence on opioids or illegal drugs.

At the same time, we are losing our faith in the medical establishment to help us. GlobalWebIndex found that trust in traditional pharma is lower than trust in the CBD industry in the US. More than half

"**As awareness grows, people will start to understand how to distinguish between products, so we welcome bigger brands, because this increases the scrutiny and the level of compliance in the industry**"

(54%) of internet users in the US agree that the claims of CBD companies are 'trustworthy', compared with 48% who believe the same about pharma brands. In the UK, 41% of internet users trust CBD companies – close to the 44% who trust pharma.

Sustainable growth

We can dismiss this as naivety, wishful thinking, or part of the long-term decline in trust in authority, but some of the responsible, smaller brands have embraced the social purpose of what they do as much as the commercial opportunity (see box, p33, Foria Wellness). Where regulation struggles to keep up, they do not see the opportunity to make a quick buck as much as the responsibility to build sustainably and transparently.

LDN CBD, a boutique retailer and mail order CBD supplier, rejects 98% of the products it is offered, and co-founder Joseph Oliver dismisses the usefulness of many of the products he sees, as well as the long-term prospects for companies that cynically offer CBD-infused consumer goods with tiny active doses. "If you're going to eat CBD granola from some big cereal brand, the first thing to

know is that it probably isn't going to work," he says. "The bio-efficiency and the bio-availability of it will probably be very low, so you're paying to pee it out – or else the acid in your stomach will destroy it.

"As awareness grows, people will start to understand how to distinguish between products, so we welcome bigger brands, because this increases the scrutiny and the level of compliance in the industry."

Oliver has spent 15 years building sustainable businesses and is pleased by the attention LDN CBD got when it became the UK's first high-street CBD retailer in 2018 – but he is wary of it too.

"We're not trying to turn a quick buck," he says. "There are about 700 CBD brands in the UK right now, and a lot of them are jumping on the bandwagon. It's going to be regulated at some point and, as long as you have high quality and are doing this for the right reasons, you can sustain your business. The others will crash."

This means offering only the small range of products that LDN CBD has tested in a specialist lab in Spain. On the other hand, it also means adopting the logistics of a much larger organisation, with

batch numbers and track-and-trace. In addition, it means listening to customers.

A survey of LDN CBD's shoppers from its first year in business shows that they are roughly equally split between men and women, of every age, and only loosely connected with cannabis. "We thought people might be buying CBD to help get them off cannabis, but 3% of our respondents gave that reason," says Oliver. "I came in with some assumptions and biases, and several of them have been proven otherwise."

The company is currently taking on investors, but it is testing their purity in the same way – and that means turning down interest from organisations that don't share the same ethical standards.

Carl Boon, managing director of Manchester-based CBD Ultra, has also boot-strapped his growth to this point. He is one of the vendors trying to create a culture of self-regulation, and that means helping out many would-be entrepreneurs who call him. "There is a huge education gap. Even a lot of the companies that operate in this space don't know much. It is not just about educating the public, it's educating the industry," he says.

As well as creating its own products, CBD Ultra works with start-ups to ensure they are compliant, and Boon occasionally consults for investors and hedge funds, warning them off opportunist companies and low-grade suppliers. A lot of this work is not very profitable, he says, but "by doing everything right, having a good product and ethics, looking after the staff and the customer, I'm sure success will come".

Boon is also active in the Cannabis Trade Association, a pan-European voluntary regulation body that plans to have a directory of products, re-registered every year, third-party tested, with product communication vetted and sanctions against non-compliant members. "We've got direct relationships with the farms and we've been doing this a long time, so we know where a product is coming from. We know all the labs – everything is lab tested before we get it, and then we third-party lab test it."

Cautious steps

So how should large businesses respond? Nielsen recently issued a note advising brands to "think broad with cannabis and its CPG impact". Rick Maturo, associate client director for the company's beverage, alcohol and cannabis business in the US (a job that would have been inconceivable only a few years ago), has seen exactly that response, having had behind-the-scenes strategy conversations with many household brands that are developing products in the shadows, waiting for regulation to be clarified.

Product development has crossed the boundaries of every type of consumer retail business – from

beverages to vaping, food and pet supplies – as brands try to offer a product for consumers who would use cannabis or CBD to switch from cigarettes, alcohol or other medicines.

The conversations began at the time the Farm Act kickstarted hemp production at the end of 2018, according to Maturo. "Frankly, they haven't slowed down since," he says. Nielsen research shows consumers switching from traditional health and lifestyle products to CBD-based alternatives.

Education and transparency will be a risk, Maturo adds. In the short run, this might lead to large companies rapidly acquiring CBD and cannabis brands that have strong ethical values. Either way, he feels the industry needs to do "a lot of clarifying" to "help consumers find the product that's going to work best for them and do so in a way that's most honourable and truthful to what the product aims to deliver."

The high stakes in getting this right has led Havas to launch Havas ECS under the leadership of Rob Dhoble, whose career has been in pharmaceutical communications. While pharma brands in the US have lobbied aggressively against cannabis and related products, Havas ECS will attempt to educate consumers and medical professionals about their best use. "At the moment, doctors are asking, 'what do I freaking do?'," Dhoble says. "The answer to that question has a lot to do with the amount of risk that the doctor wants to take."

Havas ECS will promote scientific research and publicise the findings, but it has clients in the pharma business and in consumer goods. Dhoble says ECS will not favour one side or the other (he claims that its mission statement sounds more like that of an NGO than of an advertising and PR company) but clearly his pharma clients are rattled – and with good reason.

A 2016 paper in the journal *Health Affairs* found that, in the 17 states with a medical marijuana law in place, the average doctor prescribed 265 fewer anti-depressants each year, 486 fewer doses of seizure medication, 562 fewer doses of anti-anxiety medication, and 1,826 fewer doses of painkillers. This may be good or bad news, because we don't know the outcome of patients who are self-medicating, or whether they are doing it because cannabis and

Foria wellness

Foria, a California-based health and wellness start-up, markets its vaginal suppositories, containing CBD, as a natural way to alleviate the discomfort of menstruation, and its 'lube' products – "though we prefer to call them arousal oils," says Kiana Reeves, chief community educator – as a way that cannabis and CBD can improve our sex lives.

With its marketing through testimonials, feedback, and willingness to sponsor medical research, Foria is the archetype of the innovative, transparent,

sustainable CBD and legal cannabis start-up. Its website is packed with testimonials and information, but there's a community feel, rather than a sales pitch or a lecture.

"Purity and transparency are key," Reeves says. "Many women's products, from tampons to lubes, use convenient or cheap inputs that aren't regulated, and research shows that these toxins and oestrogen-mimicking compounds can have serious effects on health. We consciously avoid perpetuating shame and unattainable aspirations."

Like other start-ups in this market, it prioritises word-of-mouth growth, and frets about talking down to its users. "Our more measured approach can be frustrating when other companies ramp up the hype and do a disservice to these remarkable plants by overpromising, or by delivering lower-quality products that leverage the hype around CBD," Reeves says. "But, in the end, we're building a brand that will stand the test of time, because of the trust we've built from the beginning."

> "We thought people might be buying CBD to help get them off cannabis, but 3% of our customers gave that reason. I came in with some assumptions and biases, and several of them have been proven otherwise"

CBD provide better results or because it is cheaper.

"What we're talking about is wellness," says Dhoble. "But with CBD products, I have seen statistics that show patients have reduced or eliminated their prescription medicine, and I don't know if that's a good thing.

"We will be ensuring that physicians and patients know why the product works, because there are some drugs that may be at risk of discontinuation because of overzealous CBD advocacy. Having some street-corner CBD vendor saying 'don't take that medicine' is a risk right now."

Despite their nervousness, hundreds of consumer-facing companies – whether in pharma, food or beauty – will be releasing CBD or legal cannabis products in 2019 and 2020, and riding a profound change in attitudes to consumption.

Maturo believes everyday items that people use habitually will be a focus for the CBD market, and that it will become as acceptable as putting fluoride in toothpaste. "Whether it is something like a shampoo or a toothpaste, or an infused coffee or tea that someone has every morning, those are the products that are going to win out in the long term," he says.

Putting the customer first

The rapidly growing CBD trend is just one of many that has been overlooked by businesses unaware of the vast potential that lies at its core.

A common mistake we see organisations make is not keeping the customer in view at all times. This is how big opportunities are missed – and, worse still, how big mistakes are made when it comes to communicating the right message and investing your spend in the right platforms.

The success of your brand is defined by how the customer sees you, and this has never been truer than it is today. Consumers are taking control of their purchase journey, choosing to opt out or block the advertising and marketing to which they don't want to be exposed. This is putting brands under pressure to serve the messages that are sure to resonate, packaged in the ways that consumers are demanding it.

Regional data sets make getting to know key audiences easy, enabling brands to put the consumer front and centre of their strategies:

Stay ahead of global trends
Trends sway consumer behaviour and change faster than ever, so staying clued into those that might be key to your success is crucial. Similarly, being aware of trends that may impact negatively on your industry is invaluable.

Build accurate personas
Understanding today's audiences means going beyond demographics. Develop your target personas and analyse their behaviours, interests and perceptions. This not only focuses targeting, but also guides wider business strategy.

Zoom in for a local view
No two markets are the same, and neither are the consumers within

them. Getting the right insights into each region you're targeting is vital if a campaign is to succeed. Compare regions using local data, and identify the key opportunities in each, to reach consumers on a deeper level.

Map the purchase journey
A customer's path to purchase has changed drastically. Mapping the touchpoints along the way helps identify any gaps in your marketing, while also highlighting the crucial moments that should be top of mind. Analyse the journey of your target personas within the regions of your choice.

Taking these steps to ensure your approach is always customer-first guarantees you the best return. You create a product or service to serve the need of a consumer – and this is something of which we should never lose sight.

By GlobalWebIndex

CV

Colin Haddley

2011–present:
Director of strategy, insight, capability and marketing services, EMEA Heinz

2008–2011:
Group account director, Brand Learning

2007–2008:
Independent marketing consultant

2005–2007:
Brand director and then product director, RBS

2001–2005:
European marketing director, infant and childcare, then insight and marketing excellence director, Kimberly Clark

1994–2001:
Various marketing roles, Molson Coors

150 Food for thought

Heinz is celebrating 150 years of business, and insight is playing a vital role in ensuring the customer is considered first throughout its strategy, as Colin Haddley explains to Jane Bainbridge

If you grew up in the UK before the 1990s, the chances are your kitchen did not contain houmous, avocados, quinoa or even yoghurt. These current popular foodstuffs were rare to non-existent on British tables only a matter of decades ago. Food fads ebb and flow, with choices from supermarket shelves as susceptible to fashion as any other consumer preference.

Even amid change, however, some items remain essential –and so it is that Heinz, stalwart of the kitchen cupboard, has maintained relevancy, despite being a 150-year-old brand.

In fact, with a predominantly plant-based product portfolio chiming with society's focus on eating less meat, and an austerity/Brexit-induced renaissance in canned produce – bootstrap cook Jack Monroe has recently published her *Tin Can Cook* recipe book – Heinz feels as current in today's culinary era.

Gaining insight into grocery shoppers in the present climate of food trends is the remit of Colin Haddley, KraftHeinz's director of strategy, insight, capability and marketing services, EMEA.

During eight years at the food manufacturer, Haddley has witnessed much transformation, including its merger with Kraft, but he says that the leadership has understood the importance of consumer insight throughout all the changes.

Indeed, his job title indicates that consumer insight is central to marketing

> **"One good thing is to build stock pressure – multipacks and deals: if you're in the cupboard, you're more likely to be used"**

and business strategy, rather than siloed, and Haddley's overall aim is to ensure the consumer is put first throughout the business's marketing and category teams.

As you'd expect with a company the size of Heinz, the insight team is constantly juggling multiple short and long-term research projects. "It's a lean team, divided into continuous and bespoke research. We have a mix of nationalities and expertise and, over the years, we have built more and more influence in the business," says Haddley.

There is a discipline inherent within the team, he adds, that starts with strong rituals and routines. "Each year, we comprehensively review macro trends with our agencies and we conduct a thorough situation review. We run brand-equity reviews quarterly; have two days a quarter with the area president and the CMO, systematically reviewing our brands; and meet weekly as a team to prioritise projects."

One of its biggest recent projects has been the 'Ideas Factory', a process designed to democratise creativity across the business. It's been a massive undertaking, which culminated in the team launching it to more than 100 people across marketing, R&D and sales. "It's an online tool designed to change our approach to product ideation," says Haddley.

"We want more people to generate more ideas, more of the time. But there

"We are building on the work that people have been doing for the past 150 years... doing common things uncommonly well"

are many barriers to this; the Ideas Factory offers a blend of stimulus, creative techniques and intuitive workshop planning to support more effective workshops."

The team has added key macrotrends and category understanding into the tool, and pilots have already shown that preparation time can be cut by as much as 75%, says Haddley, whose team is also working to ensure consumer input is brought in earlier to the new product design process.

"In things such as our four-day sprint, we want to bring in prototyping much earlier. I know this is well-trodden ground, but it's very hard to build it into the process because it's a big effort. We're trying a much more condensed process, involving consumers throughout, but there's a lot of prep for that – you need to have the prototypes ready to use with consumers."

Haddley is working toward breaking down the traditional staged approach to product ideation, where ideas, concepts and product development are all separate. "We need to blend these elements throughout the process and involve consumers in different ways. We are experimenting with new ways of

working with consumers and data that are quicker, less transactional, and more iterative. This includes the Ideas Factory, using AI to develop opportunity platforms and social listening," he says.

Few food manufacturers have escaped the rise in awareness of the salt, sugar and fat content of foods – especially in processed and junk foods. With increasing childhood obesity, high fat, salt and sugar (HFSS) foods have come under government scrutiny and it's currently consulting

on introducing advertising restrictions for these products. Inevitably against this backdrop, Heinz has looked at the formulation of some of its products, and established a four-point wellbeing plan – one of which is to 'reformulate existing Heinz varieties, as well as launching innovations that offer healthier options'.

Haddley says that the macro trend of healthier eating was easy to spot; what was important for the company was maintaining the "Heinz signature taste", with products such as its 50% reduced salt and sugar Ketchup and No Added Sugar beans. "We used research to validate the sensory profiling on those products," he says.

In 2016, after 18 months of surveying more than 5,000 consumers, Heinz launched its Seriously Good Mayonnaise range, in a standard and light version. "We wanted to create a recipe that would work well across multiple geographies and have a very clean ingredient profile. It's probably the most validated project I have ever worked on because it was a new platform for us – and it's a big market," says Haddley.

The merger with Kraft also opened up opportunities with brands outside the Heinz family. One of those was the Bull's-Eye barbecue sauce range, which launched in the US in 1985. The company ran qualitative research in Germany and UK, alongside concept and product testing. "From this we identified a very clear target audience – 'Tom', who is open-minded, and values individuality and creativity, but also honesty and hard work. Tom admires people who display conviction and don't compromise on what they believe in," says Haddley. "With this target audience in mind, we built a full marketing mix. Our communications were anchored in 'Cook Strong' – supporting strong flavours and confident BBQ cooking."

Bull's-Eye was relaunched in Germany in late 2017 and launched in the UK in January 2018, and has achieved strong

incremental growth and repeat sales, according to Haddley.

While Heinz is juggling a relatively broad product portfolio, its 150-year anniversary has been at the creative heart of its latest advertising. In April, the brand's 'clean plates' ads ran across EMEA; its tomato ketchup was promoted by singer Ed Sheeran; and, in July, it launched its first masterbrand advertising for a decade.

The brand-building ads created by Bartle Bogle Hegarty London came in three executions – focused on Tomato Soup, Beanz and Seriously Good Mayonnaise – and centred on small moments of happiness in people's everyday lives, with the strapline 'Heinz makes it better'.

Heinz brought in advertising consultant Peter Field to discuss emotional brand building with the team compared with short-term sales activation. "We built these principles into our media planning with Starcom. We also use marketing mix modelling to understand how media complements in-store activity," says Haddley.

"In the UK, we see a very strong halo effect between the brands, because we have a masterbrand that connects with consumers.

"Our 150-year campaign was an emotional brand build, with the 'Heinz makes it better' work in the UK more focused on individual categories. It's got a strong appetite appeal and that does a slightly different job.

"The Ed Sheeran partnership and Heinz Caviar activities keep us connected to consumers by being salient – all these elements work together for a bigger impact."

Many food brands have struggled to break out of the stereotypical housewife shopping and feeding her family format, so I wonder how much Heinz has tried to address that.

"The 150 years clean plate isn't stereotypical; it's a different perspective. You're looking at interesting scenes; there's a woman on the bus thinking about chips and mayonnaise, she's not in the family kitchen – so we are moving away from that," says Haddley.

Facts

- Heinz employs approximately 2,100 people across the UK and Ireland
- The Kitt Green factory, in Wigan, produces more than 1bn cans of beans, soups and pasta meals annually, and is one of Heinz's largest food factories around the world
- The UK is the biggest bean-eating nation
- More than 1.5m cans of Heinz Beanz are sold each day.

"It's a challenge because, on the one hand, you want to trigger the mind's reward system that knows about food in those places – but, at the same time, you want to differentiate. It's about being true to the brand, being distinctive – triggering that emotion, but not relying on stereotypes."

Advertising, of course, is geared to boosting sales. With the average shopper buying Heinz about 13 times a year, the company needs recency.

"People still have their way of building up their shopping and filling their store cupboard. We need to keep salient and remind people, and that's why ongoing advertising is important. One good thing is to build some stock pressure – multipacks and deals; if you're in the cupboard, you're more likely to be used. You're not necessarily going to drive out to get a can of beans and drive back, but – if it's in the cupboard – you might think, 'ah, I can use that'," says Haddley.

Finances, of course, affect the way people shop and Heinz uses food diaries to understand motivations better. "In qual research, I've seen that people – particularly on a budget – may start the month in fresh produce, but, by the end of the month, they're going toward store-cupboard essentials.

"What's critical for us is the host food – the food that goes with beans, such as potatoes, toast or sausages, or the food that goes with ketchup or brown sauce."

Heinz uses all the big guns for its information gathering – from Nielsen's electronic point of sale (Epos) data, to panel work from Kantar, GfK and Nielsen. "We moved to Ipsos three years ago on brand tracking; it has a strong methodology, which includes attitudinal equity – essentially, how close consumers feel to the brand and rate its performance – and then market effects, their perception on price and availability. Brand tracking provides a common language for assessment across all our brands and we measure that across EMEA," says Haddley.

For social listening, Heinz uses Synthesio, and it has worked with Xanobia to fix the language used around

"**The Ed Sheeran partnership and Heinz Caviar activities keep us connected to consumers by being salient**"

the Heinz brand. "We've done a lot of work on tightening up the brand foundations. We are building on the work that people have been doing for the past 150 years, and trying to codify it, to then produce more consistent work moving forward. It's the idea of simple greatness – doing common things uncommonly well."

There is no shortage of insight work at Heinz, and Haddley sees it as two discrete types of work.

"First, using consumer insight to inspire – and I am very pluralistic in terms of data; I don't think one

methodology has to be the right answer, because they all give clues about needs. Here we want to invent and create, which is why things such as the Ideas Factory are so important.

"Once you have created something, the second area of work is validation. That's when I want to be super-strict on method – when I want to compare results and benchmark. In my experience, people get lost in the front end or the back end of that. Research will not tell you the answer, but it will definitely validate the answer you come up with."

Rewarding
curiosity

The British Museum attracts visitors from far and wide, and it's Stuart Frost's job to make sure they are getting the most out of their experience, be it from the permanent collection or special exhibitions – as he explains to Katie McQuater

Part of our job is to make sure we attract people's attention, but then, when we get it, we reward it," says Stuart Frost. As head of interpretation at the British Museum, he is focused on shaping an experience within the 260-year-old organisation that is relevant for visitors today, doesn't sell the museum short, and helps people connect with what they're seeing.

"'Interpretation' can be defined as anything that helps people make sense of their visit to the museum," says Frost, and this feeds into all parts of the organisation, including programming, marketing and retail. His specific role within the interpretation team is to develop permanent gallery displays and special exhibitions, and he runs the museum's team of volunteers, too.

Not only do permanent galleries and special exhibitions attract two entirely different audiences, but people also behave differently in each.

"In special exhibitions, particularly those with an admission charge, it's predominantly people from London and the South East," says Frost. Because they have invested time and money to going to see the exhibition, they are highly motivated, committed and keen

The British Museum has 80 galleries and about 80,000 objects on display

to get value for money – on average, visitors to a big exhibition will stay for around an hour and a half.

"From an interpretation point of view, you can choreograph the visitor journey – try to create a nice narrative arc that is

> **"People will try to read it all and get tired, and think 'I just want to go to the shop now'"**

emotionally engaging, intellectually satisfying and stimulating," he says.

However, precisely because exhibition visitors are so committed, size becomes a bigger concern; a few too many

objects and there's a risk people will become fatigued. "People will try to read it all and get tired, miss the big dramatic finale and think 'I just want to go to the shop now' or 'I need to sit down'."

In contrast, the permanent galleries attract a far higher number of international visitors – around 70% of the audience is from overseas – and they stay for far shorter periods of time.

"Roughly about the same proportion of people will be first-time visitors – and there are 80 galleries to visit and about 80,000 objects on display. So that's quite challenging for people to get to grips with."

With such an established institution, many people have preconceptions of what the British Museum stands for and what types of people visit before they've set foot into its impressive domed Great Court.

A novel approach

Taking place from 23 May to 26 August 2019, 'Manga' – at the British Museum – was the biggest exhibition of manga ever displayed outside of Japan.

The museum worked with TWResearch on qualitative formative research to inform the exhibition's design, interpretation and marketing.

The research consisted of three focus groups with different audience segments: young British Museum members and Japan 'enthusiasts'; manga 'enthusiasts'; and exhibition-goers and parents (belonging to the museum's 'self-developer' and 'art lover' segments).

In addition to wanting an exhibition that was dynamic, immersive and experiential, to reflect manga's energy, most participants wanted the basics to be explained, including how to read it (from back to front) and iconography. This informed the interpretation in the exhibition explaining the use of symbols to communicate sound and movement to the reader.

The most challenging aspect was the wide range of audiences – from passionate fans of manga to "regular British Museum exhibition-goers who knew almost nothing", says Frost. "From an audience point of view, manga wasn't something that most visitors associate with the British Museum. We do collect modern and contemporary Japan, and manga, but it isn't something that the wider public was particularly aware of."

Morris Hargreaves McIntyre is conducting summative evaluation for the exhibition – data collection began on its first day and was ongoing while this article was being written.

"From younger visitors and people with BAME backgrounds, there is a perception that the British Museum is a traditional organisation – one that is academic, hard work and focused mainly on the ancient world," says Frost. "The summative evaluation for Manga will show that the exhibition has helped shift this perception for the younger audience it has attracted."

However, a segmentation model developed by Morris Hargreaves McIntyre found that the museum isn't merely a destination for tourists visiting London from overseas; its seven segmentations cover a variety of visitors, from schoolchildren to those with intellectual motivations.

"Historically, there's been this perception – and it's still held by others in the museum sector at conferences – that you open the doors at the British Museum and tourists just come in," says Frost. While the museum does draw a high volume of international visitors, most of them are not in "classic tourist mode" – the sightseer segment is around 20% of its audience. "It changes the way the institution thinks – it's more nuanced than that and we need to be more sophisticated about who's coming and why, and what they're actually doing while they are here."

Special exhibitions are not only effective at attracting new visitors, but they also play an important role in challenging assumptions about the museum and gaining diverse audiences. The recent 'Manga' show (see panel, A novel approach) – perhaps not the type of content traditionally associated with the British Museum – is one example.

Frost says: "Exhibitions are very powerful at changing people's perceptions of museums. With the right programming, and the work that goes on around it to develop links with communities, it's a really useful tool for showing what the museum can do and what it has to offer."

For example, an exhibition held at the museum in 2012, 'Hajj: journey to the heart of Islam', drew an audience that was 60% black and minority ethnic (BAME) and around 46% Muslim, according to Frost. For comparison, visitors to the previous exhibition were around 96% white.

The museum is in the process of deciding its priorities for the next phase of its public engagement strategy, says Frost, and exhibition programming is a key element. Evaluating which

audiences are coming to each exhibition is a core part of this process.

"An exhibition such as Manga is going to attract a very different audience from 'Troy', and to have that robust data of who's gone to that particular show is really valuable," explains Frost.

"It's vital that we attract younger people and we develop a programme that diversifies the audience and draws different people in. For anyone who's involved in public programming, that data is essential."

Capturing attention

The museum undertakes front-end evaluation around 20 months before an exhibition opens, to test initial reactions to the concept, including what people already know about it and what challenges there might be in making it appealing. This typically takes the form of focus groups or phone interviews conducted by an agency, occasionally followed up with an online survey.

In the research for its forthcoming Troy exhibition, the museum found

The British Museum's Great Court (above, left) and items from its Manga exhibition

there was a high level of interest, which created a challenge in itself. "People's expectations may be shaped by watching a Hollywood film with Brad Pitt and they're expecting massive walls with rows and rows of soldiers and armour," says Frost. "The archaeology of Troy was not really like that, so it highlighted the importance of drama, storytelling and immersive design."

Formative evaluation typically happens 12-14 months before opening. At this stage, provisional design work on the exhibition layout will have been completed and focus groups will go into more detail about what people know and their concerns. At this point, the curator will also usually become involved in the visitor research.

"In a really good exhibition, everyone's pushing each other and saying 'we should be aiming higher than that; people should be able to take away more than that'. If everything's in harmony, hopefully you get the perfect exhibition," says Frost.

The interpretation team conducts tracking studies to observe how visitors move around the museum and gravitate towards objects and information. In future, Frost would like to experiment with eye-tracking studies for clearer insights into how much people are reading.

The museum has used technology, such as iBeacons, to assess general flow within the museum, but tracking for smaller gallery projects is still done manually. "Most people go to the object first and then they look for the information – and they have questions, such as 'what is this curious terracotta thing?' You've got to answer the obvious questions before you give them more information on where you want to get them."

Galleries have traditionally been laid out like books on the wall, with the expectation that people will read the information in a linear fashion. The reality, of course, is different, and today museums know that information must be structured to not only capture

Visitors to the museum fit into seven segments including schoolchildren

people's attention and hold it, but also to ensure they encounter the bigger ideas and take something of value.

"If people are only stopping at a small number of objects, we need to make sure they're the ones that will tell the story we want them to leave the gallery with," says Frost, discussing what the

> ## "Audience expectations have risen and – if you fall short – people notice, and they let you know"

museum calls "key gateway objects". These must be some of the most important in a collection and be visually pleasing.

Too much information?
How does the British Museum ensure that special exhibitions are informative without being dry, or clear without dumbing down? It uses tone of voice and text guidelines to maintain consistency, but every exhibition is slightly different, Frost says. For instance, a recent exhibition in

partnership with *Private Eye* editor Ian Hislop on the history of dissent, had a suitably irreverent tone.

The museum has also built a large database from its evaluation, dating back a decade, so it uses this for benchmarks and to inform future work. One of the things it has determined is how 'wordy' an exhibition can be: the optimum number is between 10,000 and 14,000 words. In the past, however, it has been as high as 25,000 – a lot for people to read, and something that has been "reflected in the data", says Frost.

By applying insights in this way, he feels the exhibitions have improved over the years – but, of course, this means people expect more. "Audience expectations have risen and – if you fall short – people notice, and they let you know."

In a way, Frost's role is about making the universal personal. "Everyone should be able to come to the museum and find something that connects with them personally.
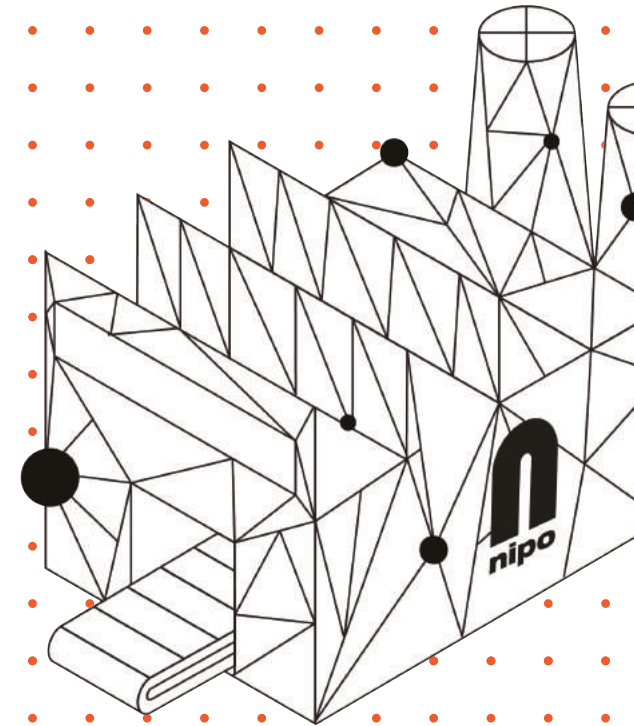
"It's such a broad audience – you have people with a depth of interest in one particular area, and someone who's visiting for their one and only time, and they've got two precious hours, and you want to make sure they see as much as they can and that you're giving them an experience they'll remember."

Listen to your customer wherever they are

Social media means people's views on brands – from customer service to product design – can be shared in seconds. But marketers must be careful not to assume this is the only valid platform for understanding people's sentiment. By Jane Bainbridge

There's nothing like a Twitter storm. The indignation of the individual, ideally involving a few carefully crafted sentences, eagerly jumped on by others – perhaps with the benefit of a hashtag – and, before you know it, you have a full-on public relations crisis for a brand comms team to try to avert, calm and resolve.

With social media offering such a public platform, easily shareable and able to rack up 'likes' and 'shares' in minutes, not just days, it's not hard to see why companies spend so much time monitoring their online sentiment. Just because social media is easy to measure, however, doesn't mean it's the only, or most important, platform for customers' opinions.

Last year, Kantar signed a partnership deal with social intelligence and analytics firm Engagement Labs with the aim of analysing all aspects of consumers' conversations – online and offline. The TotalSocial platform collects data from social networks and Kantar carries out continuous surveys of a nat rep sample of the British public, to achieve a more balanced view. Sometimes, online conversations will mirror offline ones, but word of mouth often follows a different trajectory. Both sides matter to businesses, but just paying attention to one can give a skewed picture.

Brands can be assessed on four measures: volume or amount of conversation; net sentiment (subtracting negative conversations from positive ones); degree of brand sharing – how often people share a brand's marketing in their online and offline conversations; and how engaged influencers are with a brand.

Online and offline

One example of the difference between online and offline sentiment cited by Kantar is when Welsh gardener Mike Armitage spotted a white film on his compost heap. It was a plastic residue from the teabags he was composting, and this raised awareness of the fact that plastic was used in teabags; about one quarter of a teabag is non-biodegradable. Armitage launched a social media campaign, which gained more than 200,000 responses, and PG Tips removed the plastic from its teabags, with other brands following.

For the tea companies, social media sentiment during this time was not good. Yorkshire Tea suddenly found the level of negative conversations equalled good ones – it normally enjoyed positive social media sentiment – and it looked like the brand was in trouble. Offline, however, positive sentiment remained constant and, one year on, most British tea companies have addressed the plastic concerns, and none has suffered the short-term drop in sales that social media conversations suggested was likely.

By analysing almost 400 brands in the UK, Kantar has found that the tea example is not unusual; there is a relatively low correlation between online and offline trends. Of those brands ranked, overall correlation was 52.5% when it came to average net sentiment over three years – where a perfect correlation between offline and online sentiment would be 100%, and 0% no correlation.

Survey data

The online data sources used include Twitter, YouTube, Reddit, blogs, forums and customer reviews, with Kantar aggregating this through NetBase so it can be harmonised with the offline data.

Offline conversations are measured with surveys. Matt Dodd, managing director, analytics, media & digital, UK & Ireland, Kantar, says: "We conduct 26,000 surveys a year, nationally representative of the UK population, and we ask them to fill in the questionnaire based on their conversations over the past 24 hours.

"We're capturing, on a weekly basis, the conversations around 16 categories that we prompt – 'did you have a conversation about financial services'. We do not have a brand list; it's for the respondents to say the brand.

"The interesting aspect is the evolution of messaging apps and measuring dark social. The only way you can do that in a consumer-friendly, compliant way is through surveys," says Dodd.

Kantar asks survey respondents if they have used messaging apps, such as WhatsApp and Facebook Messenger, in the past 24 hours. "None of the digital titans will allow access to what's being said within the messaging context. As GDPR and legislation gets more important to customers, surveys still have a valuable role," he adds.

So how do online and offline sentiments vary by sector? Beauty tops both for sentiment. The top five categories for offline sentiment for the past 12 months are (in order): beauty, food, drinks, household products, and supermarkets. For online sentiment they are: beauty, household products, children's products, drinks and fashion.

Natural influencers

Handmade toiletries retailer Lush remains the fourth-placed brand (out of 410 measured) for offline sentiment, despite pulling its Facebook and Instagram pages. "It clearly shows that you can build a strong online presence organically," says Dodd. Lush is second in offline sentiment.

"There's still an element of sentiment being driven by people talking to people about beauty and cosmetics. Brands that have rushed toward super influencers shouldn't forget that – on their CRM systems, for instance – they'll find people who are highly engaged with the brand. They could be going to the website regularly, and they can naturally use those influencers to regularly boost their offline sentiment too."

Using social media data for market research has gone through an evolution. A more limited group of people tweet, blog and post, with the conversations often being more passionate at different ends of the spectrum. People's social media interactions are more of a broadcast, often motivated by social signalling. But the sheer volume of interactions and ability to measure them, along with AI and ML techniques, have improved the data significantly.

"We talk about turning social data into research-grade fuel; we take a lot of time making sure the topic relevance is at a high enough target range and that the sentiment accuracy is all in the 80-90% levels," says Dodd. While there may still be some online skews, he adds, clients are often satisfied with what they consider to be "good enough, if it gets me to 90%".

So, from Kantar's TotalSocial work and this sentiment analysis of brands, what is the most important lesson for brand marketers? "Don't forget that you have a lot of advocates who are not social sirens, but are talking about your brands and are open to communication," says Dodd. "Don't rush to the online orbit and forget that you've got a very useful reservoir of people talking to people."

> **"People's social media interactions are more of a broadcast, often motivated by social signalling"**

Tim Mason **launched the Tesco Clubcard in 1995 and re-wrote the rulebook on customer loyalty. Here, he writes about the evolution of the scheme and how it allowed the supermarket to understand far more about its shoppers**

Using data to create an emotional connection

Tesco was by no means the first retailer to launch a loyalty scheme. But it was the first mass UK grocer to do so motivated by wanting to harness an emotional connection to customers.

Sir Jack Cohen, the founder of Tesco, signed up to the Green Shield Stamps sales promotion scheme in 1963. Customers collected stamps with every purchase that could be redeemed for gifts.

Indeed, many questioned the decision of his successor as Tesco chairman, Ian MacLaurin, to ditch the scheme in 1977. When I joined as a junior marketer in 1982, the business was focused on operational modernisation.

Tesco took nearly 13 years to reintroduce customer loyalty. It spent the intervening years putting its house in order, creating a better product range, centralising distribution, merchandising and pricing, and building more modern stores.

It may seem obvious, but Tesco would never have been able to embrace the 'Every Little Helps' strategy that subsequently spawned the Clubcard loyalty scheme had it not ensured it could first compete effectively.

The need to know and understand who shopped with Tesco and why they bought what they did emerged from the important lessons learned from building a complete, competitive offer.

By the time Tesco replaced the competition with the customer as its strategic focus, I was marketing operations director. So, I saw how 'Every Little Helps' made Tesco a better place to shop.

But Tesco didn't need a loyalty scheme. It started instead with incremental changes, such as launching the Value and Finest ranges and promising to open more checkouts if there was ever more than one customer in front.

This also belies the assumption that reliability and innovation cannot promote emotional loyalty. Great functional performance can foster loyalty too: think of Aldi, Amazon and Apple, to name a few.

As a natural progression, Tesco launched Clubcard in 1995 with three main objectives:
● To recognise customers and thank them for their custom
● To enable direct performance marketing in a way rarely used by a branch-based grocery business

● To capture data on shopping behaviour to enable us to run the business better.

With 70% of sales matched to individual Clubcard member customers within days of launch, the first voucher mailing generated a like-for-like sales boost of £17.8m. (It still has some 17m members today.)

Clubcard customer data was cross-referenced against sales, basket and other data to infer the context needed to understand why they shopped with Tesco. This, in turn, enabled a laser focus on what the majority wanted.

It wasn't until 1997, after almost 20 years' performance delivery and five years of delivering against the 'Every Little Helps' strategy that its definition was 'to create value for customers to earn their lifetime loyalty'.

This was largely because we first made sure the total offer was competitive. Then we added data-driven insight into what customers wanted, to develop offers that would demonstrate Tesco understood them.

Clubcard was a personalised 'thank you' to customers, and they responded by opening their wallets wider. This would have been impossible had we not used their data with empathy to show we understood their needs.

● **Tim Mason is chief executive officer of Eagle Eye Solutions. He has written** *Omnichannel Retail: How to Build Winning Stores in a Digital World* **with Miya Knights. It is published by Kogan Page and priced £19.99**
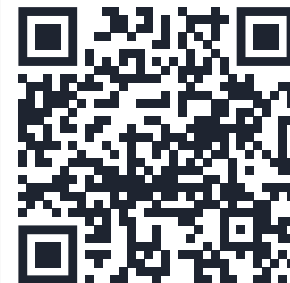
Common **values**

The advertising and marketing industry is different from the general population at a moral values level, according to new research. Katie McQuater **looks at what this means for businesses**

After the Brexit vote in 2016, the political and media establishment reacted with surprise and shock when 52% of the public called the political elite's bluff, defied the polls and, ultimately, highlighted how false assumptions can lead us to a false sense of security.

While the outcome, along with the election of Donald Trump as US president a few months later, prompted soul-searching from many, it was a stark reminder of the need to get out of our own filter bubbles.

In the context of media and marketing, some have pledged to conduct more research to address this, with one ad agency even launching an initiative to 'go into the wild' to talk to 'real people'. However, according to a new study from newspaper group Reach (formerly Trinity Mirror) and research agency House51, the issue runs deeper than geography. Their research has highlighted how the advertising and marketing industry actually differs on certain fundamental moral values compared with the mainstream population.

The study builds on previous research from the two companies, which highlighted the different 'thinking styles' of those in the media industry compared to the overall population. That work, released last year, served as the precursor for this year's research, which has explored the issue further. It has drawn on a framework of five moral foundations developed by US social psychologist Jonathan Haidt to explore the differences between people working in the marketing industry and the general public.

Surveying the two groups – UK adults defined as 'the modern mainstream' or the middle 50% in terms of household income, and advertising and marketing professionals – the research found that they placed equal importance on individualising ethics: care/harm and fairness/reciprocity.

However, the industry group found the three binding ethics – in-group loyalty, authority/respect and purity/sanctity – significantly less important than the public; a third (33%) of the mainstream

group agreed that in-group loyalty is relevant when deciding something is right or wrong, compared with 18% of the industry group. The differences were also clear when it came to agreeing whether authority/respect and purity/sanctity are relevant when deciding if something is right or wrong.

"We live in a western democracy, so we all believe in rights and individual freedoms – those two out of the five foundations are covered. But a lot of people out there in the real world value a lot of other things, and a lot of people in marketing just don't see," says Ian Murray, co-founder and partner at House51. "If you're in a bubble, you're seeing the world through that lens. It's what we all do – that's why we took the angle on morality."

Additionally, drawing on a trait empathy

scale, the research found no greater propensity towards empathy within the industry group – 30% of marketers displayed high levels of perspective taking and affective empathy, compared with 29% of the mainstream group.

"The majority of businesses are, or should be, customer-centric. This [research] contributes to the overwhelming evidence of how out of touch people are with their customers and their audiences," says Andrew Tenzer, director of group insight at Reach.

"The problem is, we're not living in normal times. Because things are so divided and tribal – and there is this lack of understanding of alternative points of view – whether we like it or not, we are, unconsciously, led to have quite a negative opinion of huge swathes of the population. Although we would like to say that we don't let that impact us, the reality is quite different."

Diverse structures

Is conducting more research the answer? Potentially – but only if it leads to meaningful insight. "If you're investing in research, but not interpreting, understanding and empathising, then it's money down the drain," says Tenzer. "Insight without skill is just research. True insight comes from people who can interpret and understand the audience they are researching."

Market researchers are not exempt from these cultural assumptions. With the caveat that the research drew quite a small sample of marketing professionals who broadly fit into the research function, the study found that they didn't score any higher on empathy

than those with other marketing roles, says Murray.

"Just as we're saying to the marketers 'you need to embrace a bigger issue here', market researchers have to as well," he adds. "We can have as many new technologies as we like, but if we're going to push the same biased cultural assumptions through, we're not going to get the right answer."

Structuring businesses to be more diverse is key to addressing the values gap highlighted by this research. While businesses recognise the importance of shared cultural values, recruiting for culture fit risks supporting the status quo and places too much emphasis on the 'in group' – that is, the agency and its values, rather than the 'out group' (the mainstream), according to the study.

So, businesses should build more diverse teams and think of divergence not just in terms of race and gender, but in terms of demographic, cultural and cognitive diversity.

Trying to solve the issue solely by using unconscious bias training is failing to see the bigger picture, says Tenzer. "Sending someone on a course for one day is not going to make that much difference. The only way to truly attempt to overcome your biases is to be surrounded by people who have different biases from you.

"The problem with the marketing and advertising industry is that we're a homogeneous group of people who are largely quite different from everybody else. There isn't really anyone there to challenge our biases. The larger issue is the structural make-up of most of the marketing and media industry."

Murray agrees that more diversity is the only way to address the differences in values. "The solution that people took from our research last year was still London-centric; it was like 'OK, we're being lazy; we can get out more. Then we will just intuitively understand people.' You won't – it's much deeper than that. The only way it's going to work is if the business is an aggregate of a much wider range of perspectives. No single human is going to be able to put themselves in the shoes of all these diverse groups of people."

● **The white paper 'The Empathy Delusion' can be downloaded at reachsolutions.co.uk/insights
The quantitative survey of 2,019 nationally representative UK adults and 199 advertising and marketing professionals was conducted in March 2019.
Figures quoted relate to the differences between the advertising and marketing industry and the 'modern mainstream' (n=1,063), defined as the middle 50% of household income (£20k-£55k).**

5 **moral foundations**

Individualising: focused on welfare/ the rights of individuals
● Care/harm: caring, kindness
● Fairness/reciprocity: justice, trustworthiness
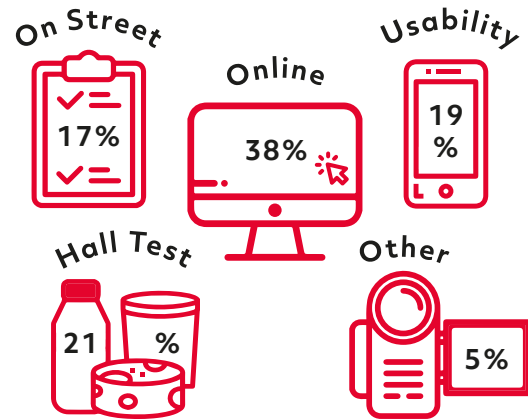
Binding: ethics of community
● In-group loyalty: group pride, self-sacrifice
● Authority/respect: obedience, deference
● Purity/sanctity: chastity, piety, cleanliness

acumen
INTELLIGENT RESEARCH MANAGEMENT
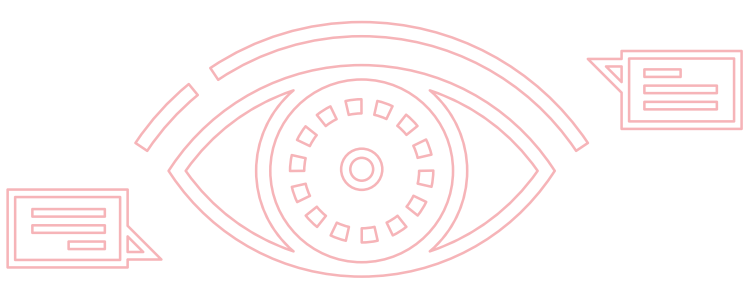
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QUANTITATIVE

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17%

Online
38%

Usability
19%

Hall Test
21%

Other
5%

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Perfect vision in hindsight

I t's funny how momentous events that surprise us in real time become major turning points in hindsight.

9/11, which shook the world on 11 September 2001, marked – in hindsight – the beginning of the loss of America's unshakeable political leadership of the world. The twin towers of the World Trade Center, emblems of America's leadership and the bedrock of capitalism, came down as a series of coordinated terrorist attacks killed nearly 3,000 people, injured more than 6,000 others and caused at least $10bn of damage to infrastructure and property. It was the single deadliest terrorist attack in human history and the moment America lost its global political leadership.

On 15 September 2008, Lehman Brothers, the fourth-largest US investment bank, with 25,000 employees worldwide, filed for bankruptcy, with $619bn of debt. It was the largest victim of the US sub-prime mortgage crisis and its collapse was a seminal event that wiped nearly $10tn off the market capitalisation of global equity markets – the biggest monthly decline then on record. It marked the beginning of the global financial crisis and the moment America lost its global financial supremacy, with repercussions still being felt around the world today.

Similarly, on 5 August 2011, the US lost its prized triple-A credit rating, held since 1941, when Standard & Poor's – one of the world's leading credit agencies – downgraded the country's top-tier rating for the first time, reflecting the government's budget deficit and rising debt burden. Indeed, Microsoft and Johnson & Johnson were seen as better bets than the mighty America; they are the only two US corporations with triple-A ratings (still held today) against the US's AA-plus.

This was an unprecedented blow to the world's largest economy in the wake of a political battle that had taken the US to the brink of default, and it marked the moment America lost its global economic standing.

The seminal moment was not lost on China, the world's largest holder of US debt, which stated through its official news agency, Xinhau, that it had 'every right now to demand the US address its structural debt problems and ensure the safety of China's dollar assets.'

Fast forward to 2019, and the current trade and tariff wars between China and America are the culmination of these moments in time, when things change once and for all and are never the same again. The struggle for global leadership of the 21st century, identified by some as a cyber war between America and China – which could last as long as America's Cold War with the USSR – is rocking global equity markets on a daily basis. We now know markets hate trade wars even more than interest rate hikes.

After 10 years of near-zero interest rates and quantitative easing, equity valuations are as stretched as they were in the dotcom boom, and debt is three times as high as in the global financial crisis, with few monetary or fiscal weapons to fight a synchronised global recession. Indeed, the timing of Donald Trump's tax cuts and the fiscal stimulus to an already growing US economy in January 2018 could, in hindsight, mark another landmark moment – a moment when markets peaked in a synchronised global recovery.

Interestingly, we have had two 50%-plus corrections in global markets in this century alone, with markets peaking in 2000 and in 2007 and then behaving rather similarly to the past 18 months, with investors buying the dips – rather than selling into the rallies in hindsight – until a systemic shock has marked the end of the party. In 2001, it was 9/11 and, in 2008, the collapse of Lehman Brothers. What will it be this time?

Officiating over the **data**

We're amid a data revolution, which means the role of a chief data officer is more vital than ever. Jane Bainbridge **reports on research with those leading data strategies**

Since 2012, there's been a 450% increase in the number of Fortune 1000 companies with a chief data officer (CDO) position. While clearly there's been a rapid rise in businesses seeing the value of employing a central custodian of data, what exactly that role entails, is still evolving.

"The role isn't completely settled yet. Just like any other C-suite role, the position of CDO will grow and evolve as our ambitions with data become greater and greater," says Caroline Carruthers, chief executive of consultancy Carruthers and Jackson, and author of *Data Driven Business Transformation*.

She worked with data science software business Dataiku on its white paper based on the insights from more than 50 CDOs around the world. The research looked at the different types of CDO, the challenges they face, what support they need and how they fit within their organisations.

Titles aren't everything, it's not just about CDOs. Vice-presidents of data, chief analytics officers or even CEOs might effectively be CDOs if they are responsible for data and its use within their organisation. But having someone specifically in the CDO role does demonstrate a commitment to data transformation.

What's crucial is that there is one person who takes ownership of the data strategy. So, how have the requirements for a chief data officer altered as the role has become more established?

"With the widespread understanding of data science as strategically important to business growth, the role of CDO has become slightly less science and slightly more business-orientated. You still need someone who has intimate knowledge of IT systems, but the role is now much less back-end and more about helping the company understand the strategic value of data," says Carruthers.

In the survey, the CDOs were asked what motivated their data evolutions and the top three things were: increase company revenue (76%);

decrease operating costs (56%); and increase team and project efficiency (56%). Competition (44%) and risk management (41%) were lower priorities for CDOs.

One stark finding was that only 8% of CDOs are content with the quality of the data they have access to. But Carruthers wasn't surprised by this.

"The bottom line is you're never going to get it perfect, so you need to get on with it. You shouldn't spend all your time trying to get your data right – let's look at ways to improve data quality but we need to target where we put our effort," she says.

No discussion about data is complete these days without referring to artificial intelligence (AI) and machine learning (ML) and, while they are priorities for CDOs, perhaps not to the extent one might expect.

CDOs' top three data priorities were: data process automation and operationalisation (23%); AI/ML model creation (18%); and data governance (16%).

Eight per cent of CDOs do not leverage ML/AI/deep learning and have no intention of doing so, with an additional 8% saying adoption is a low priority. Fewer than half (43%) use these technologies on a small scale that has not yet influenced decision-making.

But Carruthers thinks this reflects data officers wanting to make sure they have their data right, that it's organised and cleaned, before moving on with automation.

"There are so many companies that haven't got their basics right when it comes to data. If you don't understand and secure the fundamentals, you'll inevitably struggle to leverage the power of machine learning and AI," she says.

As companies' use of data has progressed, the role of the CDO has changed, as has the skill set of the data teams they lead.

While first-generation CDOs are the ground-breakers, working in companies that have never had that role before, second-generation CDOs can build on the work of those that have gone before them, and change the role somewhat.

The report points to a five-step plan for first-generation CDOs: align data collection with business goals; democratise so that everyone who needs access has it via self-service analytics programmes; establish trust in the data and those giving the insights from it; foster an environment

where data is driving decisions (often involving ML); and iterate to improve the breadth and quality of the data, analysis and insights.

Second-generation CDOs have four ways to improve data maturity: build trust to avoid having to prove return on investment (RoI) with every initiative; align data strategy across lines of business; focus on education; and enrich the data community.

It also suggests that the skills for first and second-generation CDOs are quite different and that it's 'rare for a CDO to carry out both roles effectively'.

Understaffed data teams were CDOs' biggest challenge, followed by outdated or outmoded data (12%) – extreme expectations, manual inefficiencies and lack of buy-in from the rest of the company each got 10%.

A data team should consist of both scientists and analysts to create the best models and gain the best insight, although the report could not determine a clear trend in data teams. Just over a third (35%) of data teams from those interviewed consisted mostly of data analysts, while 29% were half analysts and half data scientists.

So how can CDOs overcome the problem of understaffing, whether it's analysts or scientists they need?

"Simple – by describing the art of the possible and sharing our enthusiasm for bringing people on the data journey. Data leaders need to be outward-looking and help others understand how important this data revolution really is," says Carruthers.

She points to two data revolutions happening concurrently – the internal and the external. "The fourth industrial revolution is the external, and lots has already been written on how data is transforming society and industry. But there is also an internal data revolution – to convince other people in organisations that they need to treat data as an asset for their business, rather than something to be afraid of."

Business transformation of this degree is not always comfortable or easy. Carruthers was most surprised by how many data leaders in the study were inward focused rather than driving forward a wider agenda.

For business transformation to be achieved, those leading data strategies must look outward, to offer their organisations a vision of how data use can help better understand and reach their customers.

> ● **"Data leaders need to be outward-looking and help others understand how important this data revolution really is"** ●

Time for a story?

I regularly meet my customers to discuss how data and analytics is supporting their business needs. Among the general challenges that always come up, there is a constant theme running through the meetings: a lack of time. A lack of time to influence their customers effectively and consistently.

Companies are under huge pressure to get to relevant data quickly – and, more importantly, to extract meaningful insights and recommendations that will deliver effective results, internally and externally. While part of the challenge is around easy access to the right data, often the bigger challenge for businesses is how to give the insights purpose in a way that will resonate with key stakeholders.

My concern is that the art of storytelling that should surround the data is in danger of being lost, as a result of the pressure to go fast. Using data points in any argument goes only so far to compel or support business decisions. It's the context and positioning of the story that brings the data to life and gives it true meaning for stakeholders – and it is the story that often tips the scales in favour of a positive outcome in a business discussion.

Of late, the industry has seen an emphasis on giving speedier and simpler access to data. As a result, dashboards and analytic templates have grown among most organisations that use data with a basic level of proficiency. These dashboards and analytic improvements do help make data more accessible to a greater number of people, but they don't necessarily come with ready-made stories. And while advanced analytic approaches such as machine learning help get to the data more quickly and visualisation will evolve, the need to tell a compelling story about the data remains.

So what's the real tangible benefit of speed, improved integration of data sets and advanced analytics for the industry? I believe the value is going to be in creating time. Time that will allow us all to tell the stories that bring the value of the data to life. Time to storyboard, time to rule out different hypotheses and – ultimately – the time to consolidate the findings from the data into a useable and simple set of recommendations that can be delivered in the right context and provide the 'so what' that matters most to clients. This allows us to cut through the debate and get to a consensus on key decisions.

Advanced analytics and the supporting technology will provide the opportunity to tell the stories, but that means that, as an industry, we must have the right skills in place to bring the storytelling to life – not always a natural starting point for many data teams.

In my own business, talking through the way we tell a data-led story with the communications department pulls out how we have to invest in the right training and tools that help us see beyond the data methodology and the numbers themselves, to develop the story effectively. These skills may be outside the comfort zone of many data analysts. Therefore, within any organisation, finding great storytellers and getting them working with the data remains a vital part of a customer-facing team.

As an analytic community, we rightly talk about how investing in analytics delivers a return on investment from the recommendations we make. So, as we consider that return on investment, we have to ensure that we are not only talking about revenue and cost, but also the precious commodity of time. As we create time, we need to protect it so we have the space to think, to be more creative and to learn to tell the stories that drive our business and make an impact with our clients.

> **"Finding great storytellers and getting them working with the data remains a vital part of a customer-facing team"**

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AUTONOMOUS DRIVE

Driverless cars require humans to hand over control and trust their vehicles. But this trust depends on the timing of information delivered by the cars, as Jane Bainbridge **reports**

Put your trust in an automated car

If autonomous vehicles (AVs) are going to be the future of driving, as people predict, then we're going to have to learn to trust them. Driverless cars are hailed in some quarters as offering more fuel-efficient driving, reducing accidents and being key to more holistic transport strategies, as they sense the surrounding environment with no – or minimal – driver involvement.

Handing over control to a vehicle, however, is a significant shift in people's behaviour, and requires drivers to believe their cars are going to make the safest and correct choices.

In light of this, researchers at the University of Michigan have studied how the vehicle voice prompt affects people's trust in an AV. Lionel Robert, associate professor, School of Information, at the university, says he was drawn to this research because – having previously studied trust in humans – he realised it was based on expectations.

"We expect people to behave in a certain way, and when they don't live up to those expectations, we either lose trust in them, or we have to explain why they didn't do what we expected them to do," he says.

"With autonomous vehicles, driving is dynamic, so the car has to make decisions independent of the human, and people may think 'what just happened there?'. If you're in an AV and it comes to a crosswalk, and there's nobody around and it stops for no reason, it waits five seconds and then drives away – at that point, you don't know what just happened. But if you're told it's programmed to stop anytime anyone is near the crosswalk or sidewalk, then you get it."

So, how do different details of voice explanation affect trust? Uncertainty reduction theory (URT) asserts that people seek to reduce uncertainty through information. As uncertainty in someone increases, trust in that person decreases. The researchers used URT to establish three hypotheses:

- AVs that give explanations have higher driver trust and preference, as well as lower driver anxiety and mental workload, than AVs that don't give explanations
- Giving an explanation before acting would improve trust and lower anxiety and mental workload
- AVs with less autonomy, where drivers had options on its actions, would have higher trust, preference and mental workload, but lower driver anxiety than AVs that acted without asking permission

These were tested in a controlled lab setting, using a high-fidelity driving simulator with 32 people (11 women), using four different conditions – no explanation; explanation given beforehand; explanation given after the AV activated; and the option for the driver to approve/disapprove the AV's action after hearing the explanation.

The researchers looked at four outcome variables: trust; preference for AV; anxiety; and mental workload. They found that when an explanation was given before the vehicle acted, people trusted it more and showed a preference for the AV – although there was no difference in anxiety and mental load.

Robert says they wanted to show that giving explanations had an impact, but that it was better when they were given before the action – and better still, if people were given a choice. But he says the team were in for a couple of surprises with the findings.

"It turns out that, when you give them information afterwards, it's not better than giving them no information at all. We also thought that giving them a choice would be better than telling them beforehand – it wasn't."

Robert thinks car manufacturers can learn from the research. "The thing with instructions beforehand is that it requires a level of computational power to predict, and a car can't always do that. So there'll be times when a car must make a decision and tell you later. When that happens enough times, there is less trust," he says.

The risk is that people think there's a problem with the car. "We know from literature that we tend to assume the worst when we don't know something. So to what degree can you fill that void with correct information?"

Trust, anxiety and mental workload were all measured on a self-reported survey. Trust and anxiety were on a scale of one to seven, while the researchers used the Nasa TLX cognitive task load – an assessment tool to rate mental workload.

"We are trying to find other objective measures of trust. It's hard, because people trust from how they feel," says Robert.

But how accurate is the simulator compared with being on the road? Are there any factors – in terms of the difference between a simulator and real-world experience – that need to be considered?

"I would say no, because we had very high-fidelity simulation. It might be different if someone's life was on the line – so, if we altered the degree of safety. In this case, we didn't make the car driver unsafe, so they were never threatened. We just wanted to see what set-up people prefer," says Roberts.

In terms of autonomy, the participants were given level 4 AVs – that is, they are considered driverless in certain conditions. Participants could take over control if they wanted to, but they didn't have to, says Robert – and, in this study, no-one ever did.

"When you introduce the idea of takeover, and you want to test that, it crowds other things," he adds.

"Some people will say, if there's a human driver, then the vehicle isn't really autonomous; a lot of people will say a Tesla is more of an advanced driving assistance system than an autonomous system.

"When you go back to level 2 [has at least two automated functions/occasional self-driving] or 3 [can handle dynamic driving tasks, but might need intervention/limited self-driving] a lot of things become different."

What level of autonomy the future of driving will involve remains to be seen, but Robert is already extending his research. The next stop is comparing modes of explanation, with current tests looking at voice compared with text.

Machine wars

The war on fake news faces a new enemy: could bad actors harness AI technology to generate disinformation without the need for human writers? By Katie McQuater

Disinformation is not a new problem; propaganda and fake news have been used as weapons throughout history. Modern technology, however, has given disinformation a new edge: never has it been easier to disseminate and spread false information with the intention of misleading people.

While disinformation as we know it is written by humans and spread via social media, researchers at the Allen Institute for Artificial Intelligence have turned their focus to a new potential threat: neural fake news created by machines.

Developments in natural language generation and artificial intelligence mean they could be used to generate fake news without the need for human sleight of hand. The Allen Institute has responded to this potential threat by building a prototype, called Grover, to detect neural fake news – and to generate fake content itself, as this has been found to be the best way of detecting it. The model can distinguish between news written by humans and news written by a machine with 92% accuracy.

"It's the philosophy of 'know your enemy'," says Rowan Zellers, University of Washington PhD student and co-author on the project. "We need to know what types of attack to be prepared for, so we can defend against them."

At the moment, such attacks are hypothetical; the researchers aren't aware of any instances of this type of disinformation being used currently. "There are other types of deep fakes and human-written fake news, but the technology hasn't caught on yet."

One reason for this is that the technology generates news stories at random, based on the style and content of a particular website – for example, nytimes.com. "You can't control these models as much as an adversary would want to. It doesn't benefit an adversary to generate wrong random news stories – it has to fit their message or be viral and generate ad revenue," says Zellers.

More 'believable'

When given a sample headline, the Grover model can generate the rest of the news article itself, and the team established that people find these generations more trustworthy than fake content written by humans. "We still don't know whether adversaries would even want to generate this type of thing, but humans do find it more believable than human-generated propaganda," says Zellers.

The researchers think this could be because a lot of disinformation websites are written in a style that's not credible, such as using lots of capital letters. It may also be because writers of fake news actually believe the ideas they're peddling – for instance, that vaccines cause autism. "It's really hard for humans to lie in a convincing way," Zellers adds.

While neural fake news may be more believable from the reader's perspective, it is harder to gauge its potential effectiveness, as the researchers were unable to evaluate the model in a 'real life' setting – for example, running Facebook adverts and measuring click-through rates – for ethical reasons.

"Our evaluation is the closest approximation we can do with humans who are told they are going to be looking at news articles and some of these might not be true," says Zellers.

One of the fears around disinformation is that those seeking to spread it can simply flood social networks with lots of content and people will be unable to discern fact from fiction, because the volume of fake content is so high. But the Grover team found that the more stories they fed in from one source, the better the model became at detecting and classifying which stories were fake.

The team is now looking at how Grover's decisions can be shared with the wider public. "We can't expect everyone to know about the latest advancements in AI technology, but we need people to be informed," says Zellers. "We want to be able to communicate with users to say 'we think this article might have been machine generated'."

Testing teams

I've written previously about the vast scale of experimentation that happens across companies in the tech sector but it's important to note that those experiments extend beyond A/B testing product features or optimising technical infrastructure. Experiments can involve teams, structure, processes, culture and any aspect of the business. Indeed, the team that I now head was itself an experiment that launched at the end of 2018.

Last month, three other 'experiment leads' and I were invited to present to execs on why our experiments had succeeded compared with others. We were strictly limited to talking about why our team was successful and we weren't allowed to dwell on the actual work or impact of what we do. Thinking abstractly about my team like this was an interesting – and surprisingly difficult – exercise so I wanted to share what we learned.

Above everything else, the experiments that had succeeded had teams that felt a strong sense of ownership in what they were doing. Here are the four lessons I believe most contributed to that:

1 **A long-term vision is more inspiring than solving a problem**. Quite often, I hear of research teams or agencies experimenting with hack weeks or side projects to try to solve problems. There's nothing wrong with that *per se*, but all the experiments that were successful in this round had something in common – a clear vision that inspired people about what might be possible if we succeeded. Spending time at the start of the project to paint a picture of what you can make possible makes it much easier to find others who want to collaborate with you.

2 **Make it more than a pet project**. Projects like this need a lead who has some skin in the game; someone must be

dedicated to its success. All too often, experimental projects start with high energy and get some quick wins, only to lose steam under the weight of the team's day jobs. It is far harder than many people may think to ignore day-to-day responsibilities and focus.

3 **Measure everything, regularly**. My previous column talked about applying more rigorous measurement to market research, and projects like this are no exception. However, researchers are often reluctant to adopt any measurement approach that isn't perfect. This is, of course, perfectly understandable given our day jobs but it means we can often be overlooked as we wait to report back a number we're 100% confident in. Other functions in a business will be more than happy getting to 80% confidence and reporting that back. That's exactly what we must be more comfortable doing. Collect as much data as you can and build in monthly check-ins to force you to assess what you're doing, as you do it. Don't wait six months for the perfect answer.

> "The reality of working on experimental projects involves dealing with unexpected roadblocks"

4 **Hire people comfortable with ambiguity**. The reality of working on experimental projects involves dealing with unexpected roadblocks, working out ways to measure things that you didn't consider before, and fluidity in almost every element. This isn't for everyone and we shouldn't penalise people for not wanting to work in difficult, often ambiguous environments like this. Actively hiring people who are comfortable (or thrive) in such a working culture is essential. Look for people who find lessons in failure rather than taking setbacks personally and who want to lean into complexity. Without those people, any difficult experiment will be 10 times harder to make a success.

Sniff test

Bad smells can make our memories stronger and improve emotional learning.
By Katie McQuater

Scent can be very powerful, often evoking memories and positive associations more clearly than by looking at a photograph or listening to a song. When we think of our sense of smell and its link to memory, however, we tend to focus on pleasant scents – the aroma of a favourite dish or a loved one's signature perfume.

While unpleasant smells and negative experiences warn us of dangers and hazards, could they also play an important role in how we remember things? According to a new paper, memories are actually strengthened if a bad smell was part of the original experience.

The study, published in the journal *Learning and Memory*, and with authors from New York University, Columbia University Irving Medical Center and the Weizmann Institute of Science, highlights the link between aversive odours and episodic memory. Aiming to build on previous research that has shown how adults' memories are boosted by emotional associations, the researchers decided to focus on adolescents, and examine whether emotional learning influences memory in the same way for people aged 13 to 25.

Their primary aim was to test whether 'acquired aversive associations', using bad smell as a reinforcer, improved adolescents' memories, and whether such associations generalise across a category. For example, if someone associated a bad smell with one object, would this translate to improved memory for objects in general?

Emotional learning

Why use bad smells? Some previous studies examining the link between learning and experience have used electrical shocks, but it would not have been ethical to take this approach in an experiment involving children.

"We used aversive odours in this study, as they can be ethically administered in developmental populations," says Alexandra Cohen, postdoctoral fellow at New York University and the paper's first author. "We aimed to show that odours might be useful in studying emotional learning and memory across development."

As what constitutes a 'bad' or unpleasant odour can be subjective, the researchers asked each participant to complete an 'odour selection' procedure before the experiment.

Participants were asked to rate eight aversive smells, supplied using air-puff canisters. Each smell was rated three times, with the average scores for each calculated to determine the four smells deemed most aversive.

The four 'worst' smells were then rated again, using a nasal mask, which meant they were experienced as they would be during the experiment. The process allowed the researchers to "identify an odour that the person rated as very bad to use during learning", says Cohen.

In a Pavlovian-category conditioning task developed by the researchers, participants then viewed images presented on a screen while breathing through a nasal mask that was connected to an olfactometer – sometimes breathing in bad smells and sometimes unscented air. The researchers chose neutral images of objects (such as a chair) and scenes, and participants were asked if they noticed any associations between them and smells they experienced.

Stronger memories

A day later, the second part of the experiment tested participants' ability to remember the pictures, by showing all the images from the day before, plus some new ones. It was conducted a day later because of evidence from previous studies, which suggests that emotional memory enhancement effects emerge over time.

The researchers used skin-conductance response during the category conditioning task to serve as a measure of learning. After the recognition memory test, participants were asked to complete self-reported measures of anxiety and intolerance of uncertainty via Qualtrics surveys.

For adults and adolescents, memories were stronger a day later for the images that had been paired with bad smells, compared with images they had viewed while breathing unscented air.

In addition, people's anticipation of a bad smell was enough to improve their memories of an image, whether or not they experienced the smell. "We were able to examine arousal during learning by measuring sweat from the participant's palms," says Cohen. "We found that larger arousal responses at the time when an individual might experience a bad small or clean air while viewing an image were related to better memory for that image 24 hours later, regardless of whether the bad smell was actually delivered. This suggests that unpredictability or surprise associated with an outcome can also lead to better memory across age."

The study findings support a large body of evidence highlighting how emotional associations change the way memories are stored, leading to stronger memories that are forgotten more slowly. Further research is needed, however, to understand more about other factors that influence memory strength, explains Cohen.

"Remembering experiences associated with unpleasant outcomes can help us learn to avoid experiencing something unpleasant in the future. While this is often useful, strong memories of negative experiences can sometimes interfere with one's daily life, as is often the case in anxiety disorders.

"More research is needed for us to understand the many factors that influence the strength of our memories, so that we can uncover specific ways in which to use emotion-related memory enhancements to our advantage. We can then begin to uncover ways of preventing emotion-related memory enhancements from having detrimental effects."

> **"People's anticipation of a bad smell was enough to improve their memories of an image"**

● Aversive learning strengthens episodic memory in both adolescents and adults, Alexandra Cohen, Nicholas Matese, Anastasia Filimontseva, *et al*, *Learning and Memory*, 2019

In praise of social identity theory

Human beings are social creatures; our attitudes and actions tend to be heavily influenced by those of others, and in almost all societies there are unwritten rules about what behaviours are acceptable (or not) within specific group settings. Consequently, the power of social norms in behavioural change and social influence is widely recognised and is a popular tool among practitioners.

Recognising that behavioural change is an inherently social process, research from social psychology indicates that, for lasting change to occur, people need to internalise norms and use them as guides for their own behaviour. Most behavioural interventions to date have successfully used social norm awareness to nudge people towards a desired behaviour, for example, '92% of your neighbours reduced their water consumption over the past year'. However, for a more sustainable behavioural change, particularly for regular/habitual activities, the research suggests it may be more effective to go beyond norm awareness to norm internalisation.

To explore this idea further, I'd like to introduce social identity theory; an extremely powerful concept well established in psychology but typically under-used in the behavioural change sphere.

Social identity theory recognises that human psychology and behaviour are heavily shaped by the group memberships that individuals internalise as part of their sense of self. For example, when an individual feels that membership to a specific group is particularly integral to their self-identity or self-concept, they will try to align their actions with those of the group – otherwise they'll tend to experience some cognitive dissonance. Imagine you enjoy running and so you join a running group and start to identify as 'a runner'. Perhaps all the other members of the running group are vegetarian, and you start to associate running with vegetarianism. Since you self-identify as a runner, and runners are vegetarian, it is likely that you will also start to eat less meat.

Joining the in-group

The social identity approach aims to influence behaviour by making it a defining and salient 'in-group' characteristic, such that new norms become accepted and integrated into our social identities. The integration and internalisation of social norms can help promote more sustainable behavioural change, something that interventions based on simple awareness of social norms may be less capable of achieving in the long run.

If people grow indifferent to what their neighbours do, for example, and become accustomed to the social norm statistic, these approaches will require ongoing and/or varying 'nudges' to achieve the desired behaviour. Once a behaviour has been internalised as part of our identities, we are more personally committed to it, and there is a higher chance that the behaviour will last (without repeated interventions)... And here lies the additional, unique benefit of using a social identity approach.

The social identity approach to behaviour change is beginning to

be used more regularly – from promoting environmentally-friendly behaviours, to reducing the rising fear of immigration, to tackling our stubborn obesity crisis – and it is exciting to contemplate the power that this behavioural tool could have in promoting more long-term social influence.

Two ongoing, highly successful campaigns have recognised the importance of group identities in achieving behavioural change.

Getting people to get out and vote can be a notoriously difficult behavioural challenge. In the 2017 UK general election, voter turnout was 68.8%. In the US, approximately 60% of the eligible population vote during presidential elections, and only 40% vote during midterm elections. If every eligible voter could be convinced to vote, there could be a fundamental difference in election outcomes and how accurately the government represents public opinion.

Turbovote is an organisation based in America with the goal of increasing voter turnout. It understands that connecting the idea of voting with the group identities that people hold (for example, being an employee of a company, or a resident in a specific area, or a student) and clearly linking the outcomes of elections to their daily lives, is a highly effective way of getting

"The 'This Girl Can' campaign drew on the social identity of women to tackle barriers to participating in sport"

people to vote. By connecting voting to specific group identities, Turbovote seeks to promote the integration of voting into individuals' group identities such that they not only vote in the current election cycle but also identify as a voter for future elections. By the end of 2018, Turbovote had helped more than 2.7m people register to vote.

A second example is interventions that incorporate the idea of social identity to drive initiatives that build and encourage greater physical activity, for a healthier lifestyle. A growing body of research has found that individuals who identify strongly with a group in which exercise is the norm, report greater intentions to engage in regular exercise than those who identify weakly with such a group.

In many ways, the successful UK, and later Australian, campaign 'This Girl Can' drew on the social identity of women to tackle barriers to participating in sports. One of the major barriers identified in research was the fear of judgement. By focusing on making clear that this worry is common and showing how women just like them (all shapes, sizes, abilities and femininity) are taking part in sport anyway, it helped women overcome some of these mental barriers. According to Sport England, just one year after the campaign launch, 2.8m women reported being inspired to do more physical activity.

Many of society's most pressing behavioural problems (such as climate change) require long-lasting changes to our behaviour; just imagine what could be achieved through harnessing this powerful social identity concept and realising the importance of norm internalisation. And, after reading this article, maybe ask yourself a probing social identity question – 'do you identify with people in our industry driving new thinking and understanding?'

Learning the market research trade

In 2017, the government introduced the apprenticeship levy, to apply to all employers in England with an annual pay bill of more than £3m. The levy – calculated as 0.5% of this annual pay bill and collected through HM Revenue and Customs' Pay As You Earn (PAYE) – aims to create 3m apprenticeships by 2020.

In response to concerns about the scheme's complexity, and worries that not enough apprentices were being signed up, the then chancellor, Philip Hammond, announced some reforms to the levy last year.

The Market Research Society (MRS) first raised the idea of a market research apprentice scheme in 2012 – but, at that time, the reaction from the sector was somewhat muted. Part of the problem was an entrenched belief that market research was a graduate-level profession, so apprentices weren't appropriate.

However, when the government brought in the apprenticeships levy, it changed things. The MRS went out to the market again in 2016 and by 2017 initial meetings started taking place.

Establishing an approved apprenticeship scheme isn't easy. It requires standards to be developed, and they must be unique to the sector, not equivalent to any other sector schemes already set up. The process is strict and requires 'trailblazers' to get it up and running.

A trailblazer group is a minimum of 10 employers representing a range of activities and companies within the sector. Crucially it must be employer-led – so, as a professional body, the MRS can support but not lead.

In January 2019, a trailblazer group for the market research industry was formed led by Louise Maycock, head of talent at Ipsos Mori. The group currently consists of 15 companies: Acuigen, ampersand research, BGL Group, Cello Health, Channel 4, Disney, Firefish, Flamingo, Hackney Council, House of Commons, Ipsos Mori, Maritz, Shift-Learning,

It takes time to establish an apprenticeship but thanks to a team of trailblazers, the market research sector is edging ever closer to getting one off the ground.
By Jane Bainbridge

Transport for West Midlands and Watermelon.

The idea appealed to Ipsos Mori because it had been looking at expanding its intake.

Maycock says: "We've done a lot of work to bring in a more diverse mixture of people. We had a very traditional model of being a graduate entry employer, needing a 2:1, 300 UCAS points. Now we have extended our internship offer and our pipelines into our graduate programme – taking out the UCAS points and 2:1 requirement in favour of cognitive-based assessments. So, there is massive potential to get a more diverse mix into the funnel in the first place."

So what has Ipsos Mori's experience of taking on apprentices been like so far?

"We're in the middle of it," she says. "There have been some bumps along the road; it's been a mixed bag. We've had some brilliant people – two or three stars we hope to keep. We are getting better at it.

"We underestimated at the beginning the amount of support that someone at 18 needs – even the very basic, office life stuff. There's a big difference between an 18-year-old and a 22-year-old."

The trailblazer group is now working with its allocated relationship manager from the Institute of Apprenticeships. The first stage involves creating a proposal of the occupational profile.

Maycock says the biggest difficulties are: having a role that fits the apprenticeship requirement (it probably aligns best with research assistant) and gaining agreement from everyone in a timely and effective fashion.

"I'm confident we'll get to a consensus. We've

> **"There is massive potential to get a more diverse mix into the funnel in the first place"**

had healthy debate so far – no big conflicts. We may come from different directions but there's a passion to make it work. It'll take some to-ing and fro-ing, but there is a positive feeling".

Victoria Hardy, vice-president and head of research, EMEA, Disney, says she was similarly keen to get involved to challenge herself to think about how to build diverse teams.

"I was thinking about how we can break out of a conveyor belt of graduates. They do a great job but bring only one angle to the profession. It prompted me to think how do we get that diversity of thought that's needed in any research establishment?"

Disney has similarly been dipping its toes in the water with apprentices in other disciplines.

"In my team, we took on our first data analyst apprentice at the beginning of the year. I approached it as a bit of a trial for us but it's a roaring success so far. A lot boils down to the individual," says Hardy.

She points out why it's so important to have that broad spread of companies – in terms of client sectors and size of organisation – represented in the trailblazer group.

"Even in our initial meeting we were discussing how to approach this to consider both agency-side and client-side angles and the different types of research happening there. It forced us to look at the core commonalities."

Jessica Barclay, Flamingo's head of people, culture and inclusion, believes getting agreement across all the organisations involved is probably the biggest hurdle to overcome.

"For some of us, we are keen to attract people into the industry who might not have ordinarily had the opportunity to get into it or even know about it. For others, the aim is to build a qualification that enables them to promote their existing staff, and it is our job to build an apprenticeship that does both," she says.

The starting age needs to be set but is most likely to be 18.

How long it will take to be up and running remains to be seen, but it seems likely it will take between 18 months and two years. Once the occupational profile has been agreed, training providers must then be found. Companies can offer this but will need to be Ofsted inspected if they run the classroom training.

There is a clear need for this apprenticeship. Our industry must be more inclusive and finding a route into the profession that is open to a more diverse group of people is essential.

5 tips on... taking on apprentices

- Carefully select the right apprentice. Research isn't an obvious career path for most people, so prospective apprentices will need to understand all aspects of this industry and the options they might have

- Select the right mentor/buddy – someone who can really nurture and coach this prospective full-time employee

- Explain to the rest of your business why you are hiring apprentices

- Apprentices are often young, so ensure you give them clear instruction, direction and guidance in all aspects of work. Not just the tasks, but also how they should behave in an office environment

- Treat them well – give your apprentice lots of opportunities.

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

Updating the code

The Market Research Society (MRS) adopted its first self-regulatory code in 1954, with the current version of its Code of Conduct coming into effect on 1 September 2014. The code, regulations and associated disciplinary procedures – supported by a suite of guidance documents – apply to individual members, accredited company partners and those retained by them. The code was created to support those engaged in research and insight in maintaining professional standards. It originally covered practitioners' activities from inception to design and from execution to the use of data in research.

To recognise the expanding role of practitioners, beyond research, the code was updated to cover all professional activities undertaken by members and company partners.

The code is technology and methodology neutral; it sets out overarching ethical principles supported by rules of conduct. Drawn up by practitioners for practitioners, the code helps to protect suppliers, clients and participants, and safeguards standards, promotes confidence and champions professionalism.

Why is the code reviewed regularly?

MRS is committed to keeping the code under regular review to ensure it continues to be fit for purpose in setting high standards for best practice in the research sector. Revisions have been made to reflect evolving ethical best practice and recent significant changes in the data protection framework. The changes also seek to ensure that the code keeps pace with the speed and progress of technological development and data use.

MRS conducted a code consultation earlier this year, with individual members, accredited company partners and other interested stakeholders, on major changes to the code.

What are the key changes to the code?

The content of the code – including the principles, definitions and rules – have all been reviewed thoroughly and revised to reflect national and international developments in best practice in ethics and privacy. This includes the revised data protection framework under the EU General Data Protection Regulation 2016 (GDPR) and the UK Data Protection Act 2018.

Broader scope and coverage

The scope of the code has been widened to better reflect and promote the rights of participants and individuals, as well as to protect the reputation of all professional activities conducted by members and company partners.

Reflecting the new data protection framework, developments in digital technology and respect for the rights of participants and individuals, the code now specifically:

● Covers all activities of members and company partners, whether engaged in research, data analytics or other data-collection activities
● Gives greater clarity on prohibited misleading activities, such as selling, fundraising or political lobbying under the guise of research
● Recognises a range of lawful processing grounds for the collection of primary data or the further use of personal data for secondary purposes.

Extended principles

The number of code principles has been expanded from 10 to 12 to:

● Include the new GDPR principle on privacy by design and default
● Reflect strengthened data-subject rights, such as transparency of information and processing
● Broaden the level of protection and the categories of people covered by the code, by focusing more broadly on individuals, rather than research participants
● Incorporate strengthened accountability and documentation GDPR requirements.

Clarifying definitions

The definitions used in the code have been clarified and revised, including changes made to:

● Mirror the definitions of data protection terms and concepts as used in the GDPR
● Reflect our understanding of new GDPR requirements, such as data accountability
● Broaden the categories of data collection covered under the code
● Clarify the category of individuals considered vulnerable under the code.

Revision of substantive rules

The substantive rules of the code have also been revised and expanded. It is now divided into three main sections, with subsections that follow a research cycle: awareness and adherence with legislation; commissioning and design; and the general rules of data accountability.

Key new rules

The broader scope and coverage of the code is reflected in new rules covering data analytics and non-research activities. Best ethical practice is reinforced by new rules covering vulnerable people, underlining the importance of our members' professional activities being widely accessible.

Accountability is highlighted by a new focus on prevention of harm and the need to take special care when a project is sensitive, or when circumstances might cause a participant to become upset or disturbed.

Improved readability and usability

It is important that practitioners can easily understand, access and use the code, and that it is also easily accessible to members of the public. Considering this, the revised code has been designed to improve overall readability and usability. This includes changes to style and presentation, and clickable symbols that link through to specific MRS guidance on the main sections and subsections.

These changes have been made to improve the user experience and ease user navigation around the full suite of resources available on the MRS website.

Keep up to date

Regularly check the MRS website and your inbox for further details on how the changes to the code will continue to be communicated. Don't forget that MRS members and MRS company partners can contact Codeline **codeline@mrs.org.uk** for advice on how the code changes will impact upon your projects.

Providing solutions, not processes

E very professional and trade association worth its salt is close to its members. So it's not surprising that our fortunes mirror yours.

Despite a tough year, I am pleased to say that corporate accreditation is growing in size and diversity, and we have met some notable milestones that have been very well received. For example, the completion of phase one of our Intelligence Capital initiative (supported by Kantar), and all the diversity activities for which I give huge thanks to our ex-chair Vanella Jackson and her volunteer committee. You can read more in the MRS Annual Review 2018-19, now available on mrs.org.uk.

We were especially proud in June of the four membership excellence gongs awarded to us by Memcom for our digital and editorial endeavours for work undertaken during – and in spite of – this difficult period (see opposite).

This month, you may be lucky to attend our sessions at the Festival of Marketing, part of our drive to raise the profile of research and insight, and engage the broader marketing and data analytics community.

Of course, the next highlight in all our calendars is the MRS Awards in December. It's an event that gives us some respite and offeres the sector a chance to show how insight, intelligence and activation are what sets successful businesses apart from the rest.

Many factors have combined to create a perfect storm – political uncertainty, privacy concerns and the trust deficit, to mention just a few. The stage is set for the research sector to re-introduce itself to the world as a provider of solutions, rather than just one cog in a process.

I look forward to working with you all to make this happen.

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

Membership mark

Show your professionalism with the new membership mark

Designed to prove your expertise, the new membership mark can be downloaded and used on your LinkedIn profile, business cards, CV and email signature to demonstrate that you're a recognised member of MRS. As all members sign up to the MRS Code of Conduct, the mark reflects your commitment to research best practice to customers and employers alike. You can access the mark in your MyMRS account and on a special LinkedIn page for members.

Knowledge Centre

Access 50 e-books on business, research and development

Build your knowledge of digital branding, big data, geodemographics, AI and more with the online Knowledge Centre. This specially tailored benefit features 50 e-books from independent business publisher Kogan Page, along with videos and articles to keep you up to date. You can bookmark your search results as well as build your own reference library. There's plenty to help with your own development too, including books on leadership, creativity and neurodesign.

Your preferences
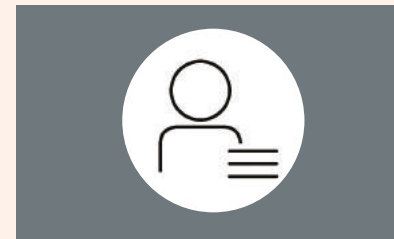
Manage your account details and renew online

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

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

www.mrs.org.uk/membership/benefits

Diary dates

Speaker evenings
How Segmentation is Storytelling, and how to get better at it
This event debates how the role of storytelling in research can sometimes be overstated, but when it comes to segmentation it's of the essence.
10 October

The Unusual Suspects
At Twitter HQ, hear how a research project helped disability charity Scope reach beyond its 'usual suspects' to engage new audiences and redefine its brand purpose.
15 October

Let's Stop Speaking Quantish
Understand how, by creating more compelling conversations, we can move quant research on from simply keeping score to offering strong commercial guidance.
21 November

Conferences
Data Analytics: tools and methodologies
Designed for delegates who want technical detail and a hands-on experience to get the most out of different data sources and data science tools.
16 October

&more Conference for Young Talent – new for 2019
The special conference designed for young professionals features insight sessions on storytelling, the World Cup and *Love Island* at Unilever House in London.
24 October

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

16 October | London

Data Analytics Tools and Methodologies
Discover the latest models and methodologies in analytics

Construction & Property Research Summit – new for 2019
Discover how insight and intelligence is driving productivity, innovation and building excellence across the built environment at this new conference.
30 October

Financial Services Research Conference
This conference covers the critical issues facing UK financial consumers and how market research is supporting the delivery of real solutions.
14 November

Training highlights
Advanced Consulting Skills
A three-day masterclass designed to transition account managers to senior business partners with effective consulting skills.
7, 11, 18 October

Essentials of Quantitative Research
Develop a full understanding of the quantitative research process, including sampling and best-practice questionnaire design.
15–17 October

Mental Health Awareness
A half-day course to raise your understanding of mental health issues at work including how to look after your own wellbeing.
21 October

Machine Learning
Designed for the technically minded, this course outlines the growing importance of machine learning and its role in business.
25 October

Advanced Questionnaire Design
Learn to understand and apply the more advanced principles of questionnaire design and how to maximise their impact, engagement and value.
4 November

Neuroeconomics
Delve into the growing interdisciplinary field of neuroeconomics to discover what happens in the brain during decision-making.
15 November

Data Science
Get a practical introduction to the key concepts, techniques and innovations of data science in research and analytics.
25 November

Using R in Data Analytics
Understand the key principles of the programming language R, and how to make your data analytics more efficient.
29 November

7

Sandra Wachter is associate professor and senior research fellow in law and ethics of AI, big data and robotics at Oxford University, and a fellow at the Alan Turing Institute and of the World Economic Forum's global futures council on values, ethics and innovation

1 How can artificial intelligence most benefit society?
It can be extremely beneficial in sectors such as health, where you can augment medical decision-making by preventing or spotting diseases, and having good treatment plans. Similar things can be seen with climate change, but we must keep in mind the risks of machine learning and artificial intelligence when we create these systems. It's making sure the technology brings us closer together, rather than sets us apart.

2 Does the legal profession understand AI well enough?
It is crucial that disciplines talk to each other; there's not much interdisciplinary research going on. It's very important that we get people from different backgrounds – I work with an ethicist and a computer scientist. We have a research programme on the governance of emerging technologies, and we think about the legal and ethical challenges that arise with those systems.

3 How can big tech behave more ethically?
With big data comes big responsibility because you could potentially harm people. If you're trusted with sensitive information, you have a responsibility to be ethical and transparent about it. Organisations must anticipate possible risk. Companies and regulators want

proactive decision- and policy-making and to think about the ethical consequences. They see it as a pathway to responsible innovation rather than something that hinders progress.

4 How has your work on assumed affinity developed?
It was born of a research project I'm working on – a right to reasonable inferences – looking at whether we, as citizens, have a right over how we're assessed by algorithms making decisions about us. You can think about me however you want, I have no way of controlling your mind – but it's different when algorithms make those decisions. They use data and infer so many sensitive things about you that you're not aware of – your sexual orientation, your ethnicity and religious background.

We should have a right to be reasonably assessed by algorithms, and affinity profiling is a crucial part of that. When you access an app, search on Google maps, buy something online, all that meta data is being collected. It's usually being used to infer interest and assumed personality traits. Do I have a right over how I'm being seen, and do I have enough protection against discrimination – because privacy and discrimination are sister disciplines?

5 You have talked about anti-discrimination laws only working for

groups we already know have been discriminated against – so how do we know or predict who else might be?
We haven't found solutions yet; what we can't do is just add another category into non-discrimination law; because the list will be endless. We should be moving toward outputs and bias testing. It's about trying to test before you release the product into a critical market.

6 How can organisations ensure ethical principles are embedded in the way they do business?
Discussion around AI principles is a good starting point. The next step is how we implement this in practice. You can say that privacy is a principle, fairness is a principle – but what does it actually mean? What does it mean to be fair and fill that term with meaning, because you have to go to the engineer and say this is what you do today that's different from last week? And that's the hard work.

7 Can the global nature of technology companies versus the local nature of regulation be overcome?
It can work in the same way human rights developed. Sometimes it's on a local level, a national level, an international level; you have the European Human Rights Convention – it started somewhere. It would be ideal to start with an international framework, but often that's not possible.