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Get in touch for the July and October 2021 issues

Tim Jones, Sales Manager
Tim.jones@mrs.org.uk
020 7566 1843

MRS Evidence Matters™

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

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

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

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

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

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

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

PRINTER
Geoff Neal

SUBSCRIPTION ORDERS AND ENQUIRIES
+44 (0) 845 194 8901
info@mrs.org.uk
Impact is free to MRS members.
Subs: UK £50pa,
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ADDRESS
The Market Research Society
The Old Trading House
15 Northburgh Street, London EC1V 0JR
+44 (0) 20 7490 4911
www.mrs.org.uk

CREDITS
cover istock.com / simonbradfield
P10 11 istock.com / shironosov
P12 istock.com / ViewApart
P13 istock.com / Adil Chelebiyev
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Not one way

You've probably felt some version of 'Zoom fatigue' during the past year, as all of our real-life interactions with colleagues and friends were supplanted with a virtual realm, where the rules of engagement are different, and where you're likely to get a headache if you do it too often.

It serves as a useful example of where the rules and norms of the office – and of life – don't necessarily translate that well to virtual settings.

We may also have found ourselves in a rut with our various different modes – researcher, colleague, manager, partner, parent, friend – getting confused as work and home lives have become intertwined, and the boundaries between each mode have become blurrier.

It's because one size doesn't fit all; before all of this, we wouldn't have chosen to hold all of our work meetings and social engagements in the same setting. We pick and choose, and we set the tone accordingly.

In this issue, Elen Lewis reports on the importance of researchers going through this process – not simply relying on the same approaches, but selecting the research mode most conducive to a positive connection between research and participant, and which is likely to result in the best insights for a project (p26).

A bigger question this raises for researchers is examining what will happen to their data if people aren't behaving in the same way, assessing if they should ask different questions, and addressing the biases of different approaches.

Elsewhere in this issue, we profile new Samaritans chief executive Julie Bentley (p22), who talks about the need for systemic and structural change as part of a mental wellbeing recovery plan, adding that any such plan must address a range of societal issues to be effective. She also discusses the importance of working together to effect meaningful change.

Change was a recurring theme of this year's annual MRS Impact conference (p16), focused on transformation and recovery, and held virtually for the first time last month.

Labour leader Keir Starmer said the country should not go back to "business as usual" when the pandemic has eased, while scientist and author Dr Camilla Pang told researchers: "Don't be afraid of messy data – ask at different time points, even though that is more work, or ask a wider range of people. Get the messy data if possible, because then you can see the patterns."

Questioning the order of things is perhaps one of the enduring traits of the researcher. In the first part of a joint series (p44) with *Significance*, the magazine of the Royal Statistical Society, we hear about George Gallup, who correctly judged that leading weekly magazine the *Literary Digest*'s straw-poll of the 1936 US presidential election result had over-indexed people who owned cars and were, therefore, unlikely to vote for Franklin Delano Roosevelt.

There is more than one way to do things, as the past 12 months has reminded us. It's time to keep that in mind to keep our industry thriving.

Contents

Issue 33
April 2021

World View

Annual conference

Profile

Impact report

Features

Focus

Columnists

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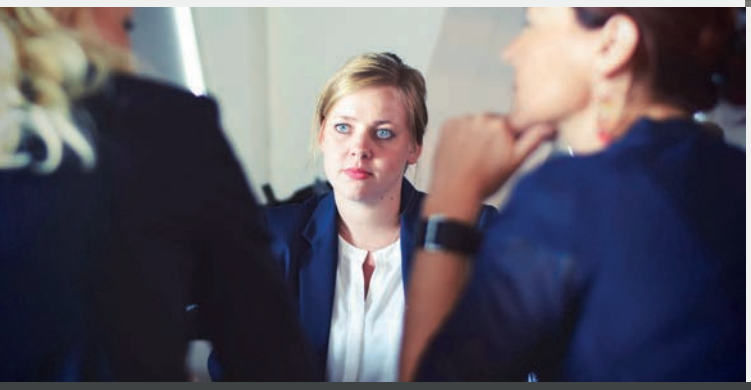

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Failing to understand simple truths

I think I've been writing this column long enough to owe you a confession. So here it is.

In all the years I've been writing for *Impact*, and in the decades I have spent working in marketing agencies beforehand, I don't think I've ever read a book about market research. Um, *mea culpa*! Soz! Awks! What can I say?

I must have read more than 100 books about advertising, one way or another – some of them not written by Winston Fletcher; and I must have read a similar number of books about behavioural science or psychology. But as for books written about market research, or written by market researchers, I don't think I can think of a single one. (Unless, of course, you include *Ogilvy on Advertising*. We conveniently forget this, but most of David Ogilvy's philosophies took root not in the advertising industry, but while working for Gallup). Gulp!

Recently, however, Jon Cohen sent me a review copy of his soon-to-be-published book called *Asking for Trouble*, which is subtitled 'Understanding what people think when you can't trust what they say'. This naturally appealed.

Reading this excellent book has suddenly brought me face-to-face with what an abominable lacuna existed in my past reading. Perhaps I should have started off by reading about research, rather than finally ending up here.

The book led me to realise that the solution to so much of the misdirected effort, economic inefficiency, false optimism – and, indeed, false pessimism – within the worlds of business and public policy lies more in your world. If I'd read this book, and others, sooner, I could have wasted so much less of my life failing to understand a very simple truth, which Jon explains almost on the first page.

So much of what we do in marketing simply starts from the wrong place. For example (and this is obvious, once you give it a moment's thought) the very question "what do you think about this?" is, in a way, absurd, because it starts from the presumption that the respondent is going to be thinking about it to begin with.

Asking what someone thinks about something risks constructing a castle in the air: "In a slightly surreal parallel universe, where, for some bizarre reason, you think about this a lot, what might you think about our idea?"

Of course, once asked, they will have an opinion and will care about it deeply, and will post-rationalise all kinds of elaborate explanations for their preference – but only because the very act of asking the question has made them think about it in the first place.

It's not that I'm blind to the problem. Obviously, being focused on behavioural science means I'm acutely aware of the wide gap between what economists call 'expressed preference' and 'revealed preference'. What I never realised until reading this book is how much of that disparity was created simply by the act of asking. Moreover, the very act of asking creates a kind of forced comprehension, when it may be completely absent in the real world.

Cohen describes one case where different ways of describing a levy on the tobacco industry had, ultimately, created a distinction in preference between two different phrasings of a proposition. But this distinction was really irrelevant, as what mattered was the blinking incomprehension with which people first reacted in being confronted with either.

"The very act of asking creates a kind of forced comprehension, when it may be completely absent in the real world"

What really mattered was the fact that most people stumbled over the meaning of the word levy, in some cases reading it as Levi's, as in jeans, or levee, as in *American Pie*.

Then there was the chief executive of a company proposing to launch a super-premium adventure travel agency brand, targeted at uber-wealthy city workers. Quite simply, city workers don't go out at lunchtime to browse. The prospective CEO heard this, abandoned the plan, and thanked the author for saving him a huge amount of money. As the saying goes, "Yes, there may be a gap in the market – but is there a market in the gap?"

In this case, I'm fairly sure that Cohen was right. That doesn't mean there aren't plenty of other opportunities to invent new ways of selling premium holidays; but a retail outlet probably isn't one. The book explained something that has puzzled me for ages about the City of London, which is why – given the inordinate amounts of money earned there – the retail environment is so extraordinarily dull.

***Asking for trouble: understanding what people think when you can't trust what they say,* by Jon Cohen, is published in May.**

World view

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

22%
– the proportion of Japan's population that are millennials
(p14)

"When you analyse women who are mothers and have a voice across media, it becomes really clear that what is inherent about the modern mother's experience of femalehood is that it's a struggle juggle"
(p13)

"We learned about the shame that many people feel having been exploited"
(p10)

The world suddenly halted, and teens took a break from their non-stop lives by rediscovering talents, passions, hobbies, crafts
(p12)

40million
– the number of slaves in the world today
(p10)

"Among Japanese millennials, there is a need for self-expression, but also less desire to consume, and, instead, be content to lead a more frugal, constrained lifestyle"
(p14)

Breaking chains

Human trafficking remains a huge international problem. Research from Stop the Traffik and Humankind Research sought to understand the reality of exploitation in Lithuania and the UK.
By Liam Kay

People coerced into work. Domestic servitude. Forced marriage. Sexual exploitation. Today, there are more people in slavery (40.3 million people worldwide, according to estimates from the International Labour Organization) than at any point in history, including during the transatlantic slave trade that ran between the 15th and 19th centuries.

UK charity Stop the Traffik works with partners to build a global picture of human trafficking. In 2019, it ran a social media campaign in Lincolnshire, UK, and Lithuania to raise awareness of the signs of human trafficking. Ruth Dearnley, chief executive of Stop the Traffik, says that the campaign was born from wider work by the charity to undermine the human trafficking business.

"That business needs to recruit, to push its money through the system at every level, and maintain or increase demand," she explains. "Our strategy is to cut the legs off those three elements."

Lithuania was chosen because human trafficking – particularly for labour exploitation – was known to be an issue in the country, with Lincolnshire an area

where many of those affected ended up. The campaign comprised video adverts paid for by Facebook, telling the story of a young Lithuanian man, offered a job in the UK, who ended up being exploited. The video linked to relevant partner organisations and a webpage, run by Stop the Traffik, that included UK labour rights information.

The campaign content was based on research from specialist research agency Humankind, followed by an evaluation project to determine its impact, as well as input from Lithuanian partners KOPŽI and the Missing Persons' Families Support Centre.

There were three phases of campaign research. In the first, six focus groups were held with people at risk of trafficking, and victims of trafficking, in Lincolnshire and the Lithuanian cities of Vilnius, Kaunas and Klaipeda. The sensitivity of the subject they were discussing, and the vulnerability of many research participants, raised challenges for the research team, says Alex Bennett-Clemmow, associate director at Humankind. "We had to make quite practical decisions about how we would reach the right people, such as switching to individual interviews for people who were not comfortable doing focus groups," she explains. "I think we got the most value out of everything we could do."

The group interviews were followed by a one-hour interview with key partner organisations in Lithuania and the UK after the campaign was launched – two in Lithuania, one from a financial services partner, and the other based in Boston, Lincolnshire. Individual interviews also took place with the campaign audience in Lithuania and Lincolnshire – two weeks after the campaign ran and then again a few months later – and consisted of 30-minute telephone interviews with 30 people recruited via the post-campaign survey, exploring their reaction to the campaign.

The researchers also ran small-scale quantitative surveys alongside the qualitative work, including a pre-campaign survey, a post-campaign survey a week after the campaign went live, and another survey a few months later. In total, 440 people responded to the pre-survey, 107 to the post-survey, and 31 to the follow-up survey in the UK.

Bennett-Clemmow says that the Stop the Traffik project was a first for the agency. "What hadn't been done before was speaking to the people who were being affected by, or at risk of, exploitation, and making sure we were learning first-hand from them to make the campaign as resonant as possible," she explains. "We wanted to make sure it was something that could be replicated."

The research project was structured in a way that was designed to be easily transferrable to future Stop the Traffik campaigns, and involved building partnerships and gathering insight to inform and evaluate communications.

According to Humankind's evaluation, 21% of UK participants who saw the video said they would behave differently in a trafficking situation, rising to 31% of Lithuanian participants. More than 500,000 people viewed the video campaign across the two countries.

"For many people, the reality of exploitation is subtle and coercive rather than violent, meaning they rarely recognised their experience as typical, and, therefore, hadn't felt that previous campaigns and support services were aimed at them," Bennett-Clemmow says.

"We learnt about the shame that many people feel having been exploited, and the stigma around it, meaning that many returnees to Lithuania never talked about their experience – with some saying we were the first people they had ever opened up to about it."

The result of the research has been to build a more comprehensive understanding of the networks operating across the two countries studied, says Dearnley. The charity works with smaller voluntary groups focused on local trafficking victims, and corporate partners, such as Facebook.

"We are building a community, and then learning from that community what trafficking looks like, at that moment, on the ground," Dearnley says. "We have insight that partners on the ground cannot have. Together, we have a better picture."

The research will feed into ongoing work by Stop the Traffik to combat human trafficking, with further funding offered by governments in Lithuania and the UK following the project. "Research is no good unless you put it into action," Dearnley says. "The more we learn, the more we share, the more others can join in. We need the richest picture of trafficking possible."

This research won the Liz Nelson Award for Social Impact at the MRS Awards 2020.

Gen Z unmasked

Research from InSites Consulting and Coca-Cola examined how young people were affected by the pandemic. By Joeri Van den Bergh **and** Begonia Fafian

Covid-19 had a tremendous impact on Generation Z. Teenage life changed from lighthearted fun full of discovery, experimentation, freedom, sharing and the outdoors to fear, lockdown, not going out, control, responsibilities, and missing out on graduations, university, birthdays and live concerts.

To learn more about how teens are feeling and how the past year has shaped their attitudes and behaviour, we applied a networking approach. We spoke directly to Gen Z through the Consumer Consulting Square – a closed, online and mobile-enabled community for moderated discussions – in eight European countries. This included about 200 young people aged between 16 and 19 in the UK, Germany, France, Spain, Norway, Poland, Italy and Romania. We then integrated 40 internal sources – both primary and secondary data – from the insights community worldwide. Despite the timing (March 2020), this was not a lockdown study – we discussed their present, but also their future.

Five key themes emerged, of which we will explore three here. The first combines gratitude and attitude. The world suddenly halted, and teens took a break from their non-stop lives by (re)discovering talents, passions, hobbies, and crafts. To give themselves structure and distractions, many actively looked for new daily activities, even including household chores or walking the dog.

The lockdown rolled teens into self-reflection about what their life is like and how meaningful they want it to become; about what would make them happy and what they are grateful for. A 19-year-old from Kuala Lumpur stated: "I used to take my life for granted, but now I'm really grateful I have a comfortable home with Wi-Fi and air con."

Being stuck at home, their bond with their family became stronger, which partially filled their socialising needs and provided support.

Teens feel overwhelmed and insecure because of Covid-19 news coverage. This is the first real crisis in their lives, which they try to "escape" by bouncing back, sharing creative, positive and funny moments in their daily lives. TikTok proved to be more than a lip-sync/dance-off platform, and shifted towards a carefree and inspiring hangout for many teens. Post-pandemic, they are likely to focus more on positive social media and fun content, avoiding trolls, bullying and fake news, as this Romanian quote illustrates: "I try to focus on social networks where there is not so much mayhem about the coronavirus."

Gen Z still loves brands, but is looking for authentic people with relevant content. Covid-19 created an opportunity for Gen Z to discover new "curators of cool" – not the usual glamorous celebrities – and these influencers are likely to remain relevant.

Teenagers are extremely vocal about brands that endorse their values and passions to right the world's wrongs, and expect brands to take specific actions. Covid-19 and the economic crisis are forcing them to recognise inequality and disparity, together with their previous environmental concerns, as this French boy says: "For a greater living together, we need to consider several parameters that complement each other, like the environment, our own health, the local community, and local businesses."

Gen Z is the generation of "click activists" – they are simply holding strikes online as the influential #PullUpOrShutUp campaign on Instagram illustrated. In its first three weeks, the campaign – calling on beauty brands to go beyond Black Lives Matter PR stunts – attracted more than 124,000 followers and prompted more than 200 companies, such as Estée Lauder and Sephora, to respond.

Covid-19 has challenged many of the structures we had in place: global travel, capitalist progress, relationships, and parenting, for example. Gen Z still feels the urge to change the systems, but, on the other hand, is facing more social pressure, anxiety, stress and loneliness than ever before. With most of them still in their formative years, experiencing coming-of-age moments during their first real crisis, the consequences of the pandemic might have a stronger effect on them than on any other generation.

All those learnings are helping to shape our ongoing conversations with teens and Gen Z around the world.

Joeri Van den Bergh is co-founder, partner and future consumer specialist at InSites Consulting. Begonia Fafian is knowledge and insights director at Coca-Cola Western Europe.

Struggle juggle

ITV explored the multifaceted experience of women in the UK to inform its *Loose Women* programme. By Katie McQuater

In 2018, the Broadcasters' Audience Research Board (Barb) analysis for UK daytime panel show *Loose Women* showed that, while the programme was maintaining share, it was flat, against a backdrop of other shows experiencing year-on-year growth.

This led to broadcaster ITV questioning how it could future-proof the programme and ensure it remained culturally relevant for its predominantly female viewership.

Lucy Crotty, cultural insight and strategy lead at ITV, led a semiotics analysis followed by qualitative research, with the findings used to inform creative development, helping editors and producers make decisions about topics and panellists.

Real language

An initial trends and semiotics analysis explored the research question of what it meant to be a 'modern woman today'. The research used the Jungian framework of female cultural archetypes and incorporated semiotics to identify potential challenges to that – for example, parenthood.

'If you look at the framework, something like 'the caregiver' feels so one-dimensional,' says Crotty. 'Whereas, when you start to analyse women who are mothers and have a voice across media, what was inherent about the modern mother's experience of femalehood is that it's a struggle juggle. We saw that breaking into the mainstream.'

It was important for the research to employ clear language for stakeholders, as the programme makers needed tangible insights that would make sense within the context of its mainstream appeal.

'When I went into my first briefing, I was talking about 'intersectionality' and that's such an academic word,' says Crotty. 'We're ITV; we're a mainstream brand; we have a heritage in entertainment as much as we have an inherent ability to inform the nation. Toeing the line between something that's entertaining for a viewer but also sends an important message is something the editors battle with constantly, so using academic terms instantly gets their backs up.'

So, rather than discussing Jungian archetypes, the research used pithy language to describe these, says Crotty. 'It's not the 'caregiver', it's the 'struggle juggle' mother' or it's framing the 'joker' as the 'funny everywoman'.'

Painting a picture

After establishing some pictures of what womanhood looks like – both dominant and emerging – the researchers used qual to test the narratives. In focus groups in London, Birmingham and Leeds, projective techniques were used to encourage participants to share their feelings on sensitive subjects, including racism.

Around 60% of the focus group participants were nationally representative and the rest was comprised of participants from black and Asian backgrounds, to understand their perspectives on how the show could better cater for their needs. Crotty asked participants to draw and annotate what they perceived to be a 'typical *Loose Women* viewer' – the result was 'a white woman with long blonde hair with a relatively privileged life'.

One of the key pieces of feedback was that they said they would never expect to see an all-black female panel on a programme such as *Loose Women*. They also wanted to see a more multifaceted portrayal of black and Asian women – not just panellists who are singers and entertainers. The programme later featured an all-black panel, stemming from the focus group findings.

Emerging from both the semiotics and qual was the sense that the programme should push boundaries, says Crotty, and balance that with its 'laugh at lunchtime' positioning. 'The pattern was starting to build that *Loose Women* should exist to break boundaries. So, we had to cover more taboo subjects in an educational, informative way, balanced and offset against the more humorous elements of life – and that was going to be our Trojan horse.'

After the research, the show experienced the first share of viewing growth in three years (14.2%) in 2019, according to ITV.

Cultural analysis for commercial insight

- For a mainstream brand, strip out the academia – reframe academic language with entertaining, evocative language
- Be as descriptive as possible, visually and verbally
- Constantly check in with the stakeholder
- Use enabling techniques in qualitative research. Crotty says: 'We didn't run a bog-standard focus group. We used all of the stimulus and weaved it into the debrief.'

Changing of the guard

Japanese millennials have very different approaches to life than many previous generations. Sabine Stork **considers some of the emerging cultural attitudes**

In the West, we tend to look at Japanese youth culture as an exotic and somewhat eccentric place. We focus on its pop-culture phenomena – from *kazai* (cute) to the cat cafés, the gaming, and nerd culture, which all, of course, exist. But Thinktank's recent qualitative research in Japan points to a serious value shift among young people that is making them a very different proposition from previous generations.

The *yutori*, roughly the millennial generation aged between 20 and 35, are quietly abandoning traditional values, including some of the conformity for which Japanese culture is known. Among the key differences is a need for self-expression, but also less desire to consume and, instead, being content to lead a more frugal, constrained lifestyle.

They have embraced the spirit of *mottainai* – meaning "how wasteful" – which derives from the Buddhist notion of lamenting the misuse of objects and resources, as well as from the need to be grateful for what the world has given us. That's a notion Japanese millennials really do buy into – *yutori* translates roughly as having the time and the space to appreciate life. And it also seems to mean being relaxed about living within constraints.

For example, 26-year-old Keiko, who we encountered in a recent group in Tokyo, rents rather than buys her clothes. That's highly sustainable behaviour. It's also, of course, very *mottainai*.

As in the West, there has been a move towards subscription clothing. The Mechakari service, from lifestyle group Stripe International, targeted women in their 20s and 30s with a starter sub, giving them the chance to wear three branded items a month for a monthly fee of 5,800 yen. Last year, as Covid-19 impacted the economy, Stripe came up with a "lite" plan, costing just shy of 3,000 yen.

The rental model has also gained traction among *yutori* for home furnishings, and at the start of this year, were joined by leading retailer Muji – a favoured millennial brand. Shoppers can choose from a range of subscription furniture, with a chair, for example, coming in at a reasonable 300 yen a month over four years. Once an item is returned, Muji sends it back out for rental or puts it up for sale.

This means that Covid-19 has had much less impact on the young Japanese psyche than it appears to have done in the West. According to a recent Media Brands survey, life satisfaction has remained fairly high among young Japanese, who enjoy having more free time and don't resent not travelling abroad or going to restaurants. Interest in foreign travel is surprisingly low – more than half of *yutori* have never travelled outside Japan, while a substantial subset have no interest in doing so either. Abroad is not aspirational, but, rather, unsafe – an impression that has grown since the early 2000s and during the pandemic.

The generational sea change in perspectives has affected views on the work-life balance. Everyone is aware of

Japan's population is set to shrink from 126 million to 105 million by 2050

Millennials account for 22% of the population

In contrast, the 55 to 75 age group was 26% of Japan's population

(United Nations, Department of Economic and Social Affairs, Population Division – 2019)

the corporate system that dominated the country after World War II and resulted in jobs for life for most, but that has now morphed. A long period of low economic growth has had an impact on job prospects, and non-regular employees now make up more than a third of the workforce.

"My job just isn't that important – I don't want it to interfere with my private life," 28-year-old Michi told our Tokyo group. "And as far as money goes, well, as long as I have enough to make ends meet, then that's fine really."

This attitude of "just getting by" has impacted retail. Budget fashion retailer Uniqlo is a *yutori* destination, as is sister store GU, which differentiates itself with even lighter price tags for its clothing. Japan's 100-yen shops are popular outlets, and chains such as Seria and Daiso offer an array of items, from beauty products through to snacks and toys, many of them high-quality.

Covid-19 means *yutori* behaviours have become more entrenched. Japan's savings rate was at its highest level in 20 years in 2020 as economic anxiety rose, and it is unlikely to fall significantly until the pandemic is over. The government made cash handouts to households last year to help boost the economy, but much of that money was banked.

The implications for consumer spending are clear. According to a McKinsey survey from December 2020, one-quarter of Japanese consumers said they are now more mindful of where they spend their money, while the same proportion are looking for ways to save money when they shop.

What does this mean for marketing to Japanese millennials? Thinktank's experience in Japan indicates that the cachet of Western brands – which has for some time been lower in Japan than in other Asian countries – is likely to decline further. We cannot hope for provenance to help us sell if large parts of the audience feel they have "nothing in common" with countries further afield.

There is a need to redefine aspiration to appeal to a Japanese generation that is looking for sustainable products and for authentic experiences. This may sound familiar, but these needs come with a particular Japanese accent – what *yutori* crave is a sense of understatement, usefulness and purpose with relevance to their local day-to-day lives. Perhaps to make a play for this generation, Western brands need to channel their inner *mottainai*.

Sabine Stork is founding partner at insight consultancy Thinktank

Understanding a world in flux

Impact 2021: Transformation and Recovery was the first virtual annual conference held by the Market Research Society. Speakers shared their research, perspectives and provocations on the role of insight in recovery and understanding an uncertain world. Katie McQuater, Liam Kay **and** Ben Bold **report**

Conjuring a moment of change

Returning to the status quo after Covid-19 would be a "huge political mistake", Labour Party leader Keir Starmer said.

The UK is at a "profound moment", said Starmer, speaking during an interview with BritainThinks co-founder Deborah Mattinson. Most people are experiencing the "very human" sense of seeking a return to normality in terms of human contact, he added. "There's an emotional, human sense of "going back to normal".

However, he said: "It's really important that we don't go back to "business as usual". We've been out on a Thursday night clapping for keyworkers who have been underpaid and undervalued for a very long time."

Labour leader Keir Starmer believes it would be a 'huge mistake' for the UK to 'go back to where we started'

Labour must now "conjure up a post-World War II moment of change," he added, citing the UK's high death toll.

"Although I do think the indecision and slowness of the prime minister played a huge part, underpinning it was the structural inequality, the failing of the economy, the under-funding of public services and the fragility of much of the infrastructure – and we can't go back to that," said Starmer. "If all we aspire to do is somehow go back to where we started, it's a huge, huge political mistake."

He added: "The Labour Party only really wins when we glimpse the future and persuade people that the future can be different, but better. In my view, that's what we need to do heading into 2024."

Discussing Labour's efforts to re-engage voters post-2019, Starmer said the party needed to "identify a winning coalition" of groups of voters that share the party's "values and aspirations".

He said: "I think the art and skill is to find the common ground between different groups. Where are the reference points? What are the values and where might they meet? When you take the difficult issues and talk them through, there are sometimes meeting points you didn't expect to be there."

Evidence is "hugely important" to Starmer, but while "the best evidence is probably an election – that tells you in pretty stark terms where you're at", he said "the most interesting" focus groups are those following a particular group of people over a period of time.

"I think what it tells you is where people are actually at, rather than making assumptions – and where is the common ground that you can use – because where people are at may not be in politics where you think you need to get to. If you don't know where people are at, there's no way of bridging to them."

He also discussed a series of Zoom calls he held with former voters after becoming leader.

"People came on screen and were looking at me to see if I was listening. They wanted to know "What's this fella like? Do you think he's actually listening?" That's not what I expected, but it was pretty profound. As much as I wanted to know what they think, they wanted to know that I was listening."

Embracing messy data

Researchers should get to grips with more 'messy' data to get a better view of how people think and feel about a subject, says scientist and author Dr Camilla Pang.

Pang, who wrote *Explaining Humans*, about her analysis of human behaviour from the perspective of someone diagnosed with autism spectrum disorder, said that the debate around how to carry out quality research was one of good versus bad data, rather than between quantitative and qualitative research.

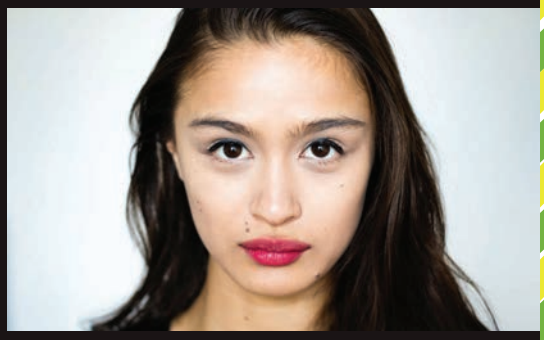
'It's trusting that the people you are surveying 'provided the questions you are asking are as good as possible 'will give you the answers they should,' Pang said.

'It is not about people lying, but about people projecting answers that they think they know, but changing their mind later. It is a snapshot. It is good to have this snapshot in time, but, ultimately, we are dynamic as people.

'Modelling this variance and not calling it an error is the best way to go. Don't be afraid of messy data 'ask at different time points, even though that is more work, or ask a wider range of people. Get the messy data if possible, because then you can see the patterns.'

Science cannot answer everything, Pang said. 'Science has limitations, much like algorithms do. Even if you make the best algorithm for doing X, Y and Z, it hardly amounts to a burpee, writing a book or doing an art. It is very specialised.'

Pang, who was diagnosed with autism spectrum disorder aged eight, and attention deficit hyperactivity disorder aged 26, also called on businesses to have greater awareness of neurodiversity. 'The workplace needs to adapt to the sensory or social needs of people who are autistic,' she said. 'It is being objective and, for example, allowing me to have the chair in the corner of the room.'



Dr Camilla Pang says messy data can help researchers see patterns

She hoped her writing would encourage more people to ask 'how I can make people who are neurodiverse more comfortable at work?' 'To find my place when I could not identify with people around me was quite alienating,' she said. 'I felt that I was missing something, a link other people have that glued them together, and they have an ecosystem where, if someone understands something, everyone else would get it. For me, it didn't seem the case.'

Changing perceptions to attract new talent

When targeting prospective recruits at university, the research industry is 'good at going into detail, but not good at describing why this should be interesting to you,' said Sara Picazo, head of UK ad research at Twitter. 'The industry is not doing a good sales job.'

Session chair Dan Nunan, *IJMR* editor-in-chief, cited a major job-perception study, which showed there was not a single market research firm among the top 300 companies selected by graduates as places they would like to work. Nunan pointed out that the term 'war on talent' has been around since the 1990s, and that, today, the situation is more akin to a 'siege on talent'' but, he asked, how effective is the sector at winning the war?

'It's not that we don't have good talent in the sector,' Picazo said. 'I think we're not deliberate enough in the type of talent background and walks of life that we bring in.

'There's an issue with diversity and inclusion. We first need to ask ourselves, when we talk about the best talent 'what does that mean? A lot comes back to having diverse skills, backgrounds and ethnicities coming into the sector. We do our best when we have a diverse set of views and skill sets.'

Harry Davies, head of measurement and analytics at Google, admitted that he had 'become a white, middle-aged man, so it feels odd 'I've become part of a majority group that tends to hold power'' 'There are lots of people who look like me, and this is the sector that's meant to be understanding the whole population and what's driving people to make the decisions they make. If that's just small groups of society, then it's bound to fail. It matters because it's the right thing to do, but, also, businesses are not able to create the right products and services for people unless they understand who they're building them for.'

Nunan pointed out that the term 'market research' is not nearly as appealing as 'data analytics' or 'insights' and suggested that nomenclature is part of the problem: 'If you ask a young person about market research, they think it's people asking them annoying questions. Do you think it's a bad term?'

Picazo said: 'It's outdated. We need to reassess this term we use externally [and shift] to a narrative around what we do. We also should be more deliberate about where we look for talent. Does it have to be in the universities? Can it be school-based?'

While the industry might be failing to appeal to young graduates, or people outside the university system, it's better at keeping its people. 'What the industry does really well is retain talent,' Davies said. 'You can meet with senior leaders and have conversations with them about methods they use, and they're passionate about it, and they've had a really long career. That's a good thing to celebrate.'

Imagining the alternative

It is important to empathise with those with whom you disagree, and understand what motivates those with different political outlooks, said playwright and screenwriter James Graham.

Graham, who has written plays, television programmes and films – including *This House*, *Brexit: The Uncivil War*, and *Ink* – said today's polarised political landscape lacks empathy, and it is good to "walk in the footsteps of someone you politically or ideologically disagree with".

He added: "I have biases and very passionate political opinions, but I don't want to project them onto an audience – that is boring and inert. It is more valuable to me to play devil's advocate with my own political baggage and imagine the alternative world."

Graham has spoken to political and public figures such as political adviser Dominic Cummings and newspaper magnate Rupert Murdoch as research for his plays. "What is the difference between accuracy and truth? Fact and fiction? The thing I enjoy most about my job is being allowed access to environments, people and professions just because you email someone. It is such a geeky thrill to be allowed a window into those worlds," Graham said.

"Like market research, it is often about how you frame the question – what am I asking? What do I want to know? – without leading you in a particular direction."

He also cited the importance of conducting research without an agenda, to make people comfortable to open up about their actions and experiences.

"People can smell insincerity, and if you are there with a particular agenda, or to exploit or misrepresent, people know it instantly," Graham explained.

"If you turn up incredibly sincerely, with a genuine desire for your own preconceptions to be destroyed and really hear people, they open up even more. You need to be prepared to go home and delete everything you have written because someone has added a perspective."

Graham writes a lot of notes, but avoids recording conversations, as he is looking to learn about someone's ideas, spirit or demeanour, rather than specific quotes. He also tries to experience workplaces or situations about which he writes, such as being in the Vote Leave campaign offices at the 2016 referendum, or working for a major tabloid newspaper.

"Once you understand something's process, you can understand a higher truth," he said. "You don't need to go in hard on the big philosophical stuff – you can enjoy the minutiae."

The balance of long- and short-term insight

Covid-19 has highlighted the agility of research teams, according to a panel discussion with Reckitt Benckiser, PepsiCo and Pearson. Elaine Rodrigo, Reckitt Benckiser chief insights and analytics officer, said: "We've seen consumer insight, data and analytics at the forefront of everything, from advising senior stakeholders and leaders about what to do, through to executive committees about what to do in the country."

Asked how the pandemic had affected their various research functions, Dr Parves Khan, global research and insight director at Pearson, said her team had done more tactical types of research than normal. "The insight team had not had the headspace to reflect on the bigger questions and bring in strategic insight," she said. "We were constantly talking with the strategy team about the stickiness of the pandemic, about how long it will last."

Likewise, for Tim Warner – executive lead for insights, data, business intelligence & advanced analytics, PepsiCo – "the shape of work changed a lot", enhancing the need for greater agility and "a degree of crisis management", responding to requests for information from across the business. "[Our newfound] agility has accelerated what we had already started," he said. "We needed to double down and ensure we have the best agency partners and tools to navigate the external environment in the next five years... We're moving towards not only keeping abreast of what's happened externally, but also how we work with partners to create more predictive capabilities."

For Rodrigo, "divide and conquer" formed the crux of her team's strategy. "It was about setting up to manage now, while not losing sight of the future. It was almost like day-to-day crisis management. It was all hands on deck, and a few of us took ourselves out of that and split into different teams, some working on short-term critical stages and others long-term."

The panellists were asked what advice they would give agency partners:

- PepsiCo's Warner has been very impressed with how agencies have accelerated their technology strategies in the past 12 months, and called for more of the same: "Don't take your foot off the gas. Focus on what you can be world-class at, rather than try to be good at many things; and try to drive digital accelerations and develop tools."
- Pearson's Khan said she needs her partners to "become a trusted adviser, a right-hand person that knows what I need without having to write a research brief."
- Rodrigo suggested that different agency types learn from one another: "There are two groups of vendors – some fast and agile, others slower, more strategic and good thinkers. It would be good if they could meet."

‘Walking the walk’ on sustainability

The insight industry must do more to make it easier for people to make the right choices for the environment, according to a panel discussion chaired by Jem Fawcus, founder and chief executive of Firefish, and founding member of the Insight Climate Collective (ICC).

Russ Wilson, independent consultant, activist, and founding committee member of the ICC, said that insight agencies needed to work with businesses on sustainability and the environment, pointing out that companies made up three-quarters of the top 200 economic entities globally.

“We, as individuals, can change our behaviours pretty quickly when we need to or want to. It is a choice we can make in the timeframe of days, weeks or months. The counterpoint to that is we don’t have the authority or power to make the changes with the larger-scale impact required,” he said.

“Government is there to drive change, but the pace of government is slow – it takes decades for big infrastructure to change. Businesses and brands have the ability to move quickly, but also the power and reach to make change.”

Fenny L’Hautier, head of marketing insights and analytics, personal health, at Philips, said insight has a specific role to play in bringing the voice of the consumer to the table, and should help make sustainability front of mind when projects or products are developed. “Make it simpler, make it easier for consumers to make the right choice, and make it desirable,” she said. “If you make the choice for a sustainable green product much more desirable than for a non-green product, we can change a lot. We don’t give the responsibility to the consumer to make the right choice – it is an intuitive choice.”

There is significant confusion among consumers over sustainability, said Jessica Long, head of sustainability – UK, Ipsos Mori, pointing out that there are 87 eco product labels in the UK alone.

“Imagine the insight that is needed, even when consumers want to do well, to navigate that space,” Long said. “It is important that we have a stake at the table and that we make sure the consumer has a stake at the table.

“We need a consultancy-level understanding of this space to help clients and consumers navigate sustainability, as it is so confusing. We are not just conducting research – we are bringing a wider context of how complex this space is, and the regulatory pressures, so the insight we are providing is actionable, strategic and will have the biggest impact.”

Agencies should also get their houses in order. “If you are giving advice on how to make a business more sustainable, you need to walk the walk,” said L’Hautier. “You can’t be a hypocrite. You need to be credible and look at your own carbon footprint. Every agency needs to think about its sustainability strategy.”

Insight should inform intuition

Many businesses have a misconception of the role that insights should play, according to Pinterest chief marketing officer Andréa Mallard, who argued that it can enrich an idea, but cannot tell a business what to become.

“I think people misunderstand insights work,” he said. “I always think of insights as something we use to inform our intuition, or inform an idea. It can’t tell you what your business needs to become.”

To underline her point, she referenced a quote by car magnate Henry Ford, who famously said, somewhat derisively: “If I had asked people what they wanted, they would have said faster horses.”

“I always think consumers tell you exactly what they want,” Mallard countered. “They wanted to go faster. They gave you their solution: a horse. But you shouldn’t listen to their solution, you should listen to their need, and their need was faster.”

“For us, we try to listen very carefully to what consumers are asking for, but not how they’re asking for it.”

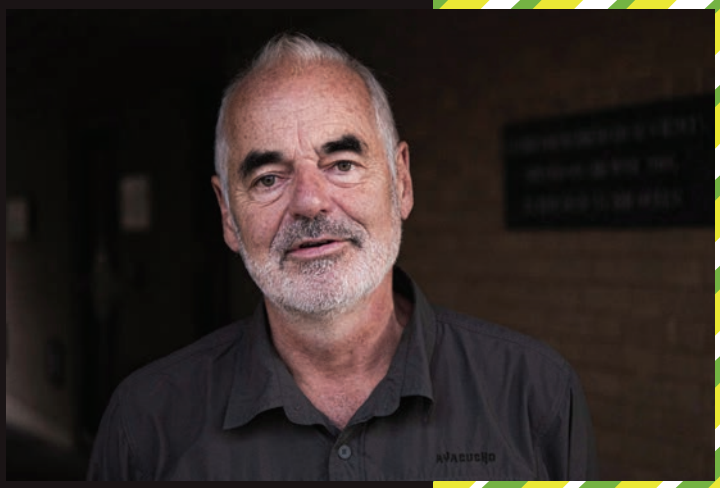
With 460-plus million people using it every month, Pinterest is a vast and rich repository of data and insight. Its scale has enabled the organisation to forecast what’s going to be big in the future – for example, how searches for podcast design will grow 130% in 2021, or that searches for laptop wallpaper will grow 30% among Generation Z this year.

One of Pinterest’s distinctions from the social networks with which it tends to get categorised is that it is very much about people’s interests, rather than a platform for their views. Asked where the company gleans insights into what is important for its users, and how it should evolve, Mallard said the company could “see that in qualitative and quantitative ways”.

“Qualitatively, we do a lot of traditional in-person focus groups, un-focus groups, and one-on-ones with people in their homes,” she said. “Both with ‘super-pinners’ – those who have been with us since the beginning and love it – and extreme rejectors – people who don’t think Pinterest is for them. We always like to go to the extremes – not just the average user – to understand the hurdles.”

Andréa Mallard says Pinterest goes to the extremes to understand hurdles for users

Pinterest’s volumes of qualitative data are augmented by the findings of its in-house consumer insights team, which is constantly talking to people. “But remember, this is a quant engine of and by itself,” Mallard said. “So, if we want to know if people are confused we can also understand why no-one’s using this new amazing feature in the way we thought they would... We’re always trying to balance and marry those two [qual and quant] to inform our intuition about what to do next.”



David Spiegelhalter says statisticians must listen to people and know their concerns

Demonstrating trustworthiness

Statistician David Spiegelhalter reflected on how statistics have been communicated during the Covid-19 pandemic, stressed the importance of trustworthiness, and warned that data alone cannot make decisions.

Like other scientists, Spiegelhalter has received an influx of media invitations in the past year. He said: "One thing I have learned is that you should stick to what you know about and shut up about everything else. I am a statistician, but nobody understands what statisticians are – they ask you about what people feel about it. I don't know, because I'm not a psychologist."

He added: "Basically, I just try to explain things; I haven't got a side or an agenda – for example, I'm not saying we need to lock down more. I haven't got an agenda, except use the data in the best way possible, and make that data accessible in a clear and transparent way."

Spiegelhalter said it is "not good for the scientific community" when it's unclear to audiences whether scientists are discussing the state of things or their own opinions. He said: "I don't mind people having an opinion, but just make it clear when you're moving on from the facts to what you think should be done."

Despite frustrations over some media reporting – the "golden oldies of horror stories" that are the daily death figures being one – Spiegelhalter said: "I think the media, as a whole, have done very well indeed, and are getting better."

However, he added: "When political journalists try to explain the specificity of a diagnostic test, I just fall about laughing. That's not their job – it's a challenge for anybody."

The pandemic has been full of unknowns, but Spiegelhalter said trustworthiness, rather than certainty, should be the aim of communication.

"Our research suggests very strongly that, if you're confident about your uncertainty, the audience does not lose trust in you – there's clearly a strong feeling we have to be certain, but that's completely wrong as far as we can see. The main thing is to demonstrate trustworthiness.

"Onora O'Neill [philosopher and member of the House of Lords] emphasises that it's not to do with 'how I can get myself trusted, but how I can demonstrate trustworthiness'."

This is particularly important for statisticians generating large volumes of information, Spiegelhalter added.

Statisticians also have to listen to people, he said. "You don't just communicate – you have to know the audience, know their concerns and treat them with respect."

Spiegelhalter expects the pandemic to change how evidence is used by governments, but he cautioned against relying too much on data.

"Don't follow the data. It does not tell you what to do. This idea of 'following the science', that data will offer up its secrets, is crass. Data does not tell you what to do – but I wouldn't want to make decisions without it."

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Good listener

With a passion for social justice, Samaritans chief executive Julie Bentley **believes we need to change the systems that damage wellbeing, she tells** Jane Simms

Samaritans has had a busy year. Between 23 March 2020, the day the UK went into the first Covid-19 lockdown, and 20 December, volunteers from the suicide prevention charity answered a call for help every seven seconds, providing support more than 1.7m times and spending over one million hours on phone and email conversations.

The charity also launched a self-help app, and, in collaboration with Mind, Shout, Hospice UK and the Royal Foundation, introduced a new service, 'Our Frontline' giving targeted support to NHS and other keyworkers.

Yet, despite growing demand for its support, volunteer numbers fell by up to a third at one point – largely because of self-isolation and social distancing measures in its 201 branches.

So, have the past few months felt like a kind of baptism of fire for Julie Bentley, who joined as chief executive in November 2020?

On the contrary, she says. 'Obviously, it's a bit challenging joining an organisation during lockdown when you are stuck in your spare bedroom and can't go out and meet people. But I found that the charity had responded extraordinarily well to the pandemic. It had managed to sustain our 24/7 service throughout, which is a great testament to the central staff team who support our volunteers, and to the volunteers themselves, who stepped up and did extra shifts to keep the service running.'

Bentley is a highly experienced charity chief executive. Samaritans is her fifth top role in 17 years: most recently, she was at Action for Children, and before that she led Girlguiding, the Family Planning Association and the Suzy Lamplugh Trust. She's been a trustee of Shelter and is currently co-vice-chair of the National Council for Voluntary Organisations. She began her career in the sector as a youth worker specialising in drug and alcohol addiction.

A fierce advocate for those whose interests she represents, Bentley has waged a number of high-profile campaigns – including calling for the right of people with learning disabilities to have a sex life, and helping girls speak out on issues including equality, sexual harassment and the media's distortion and sexualisation of young women's bodies.

Difficult conversations

'What stands out about Julie for me is her courage,' says Simon Blake, chief executive of charity Mental Health First Aid (England). 'She is always willing to have conversations others might find difficult.' In late 2020, the two published a book, *Sisters and Brothers*, based on the deaths of their own much-loved siblings, with profits going to bereavement charity Cruse. They wrote the book to fill a void: 'We should talk more about end of life, to demystify it, to normalise it,' wrote Bentley in a personal blog in December.

She is also a fierce advocate for the sector. In an earlier blog, she upbraided chancellor Rishi Sunak for his use of the word 'gentle' in relation to charities. She wrote: 'On a daily basis, charities are supporting women terrorised by abusive partners; they are caring for people in the final stages of terminal illness; they are supporting people considering ending their own life; they are protecting children who have suffered unimaginable abuse; and, not least, they are feeding people who otherwise would be going hungry because of the abject inequities in our country.

'These are not "gentle" matters. They are hard, cruel, painful, unfair, messy and ugly matters and it requires strong, determined, driven, resilient people to respond to them.'

Passionate about justice and equity, Bentley chooses her roles carefully. 'I only go into charities where I genuinely believe in what they do and to which I have something valuable to add,' she says. She also thinks carefully about when to leave. 'I am privileged to be a custodian for a period of time, during which I have a job to do, and when I feel I've done it, it is time to hand over the baton.'

She's a long-time admirer of Samaritans: 'To be able to support people when they are really struggling emotionally, and help them feel more optimistic and hopeful, just by listening to them, is very powerful.'

How does Bentley see her job here? 'I've not come in with some amazing "eureka" vision; I want to build on the momentum that already exists,' she says.

Samaritans rebranded in 2019 in an effort to appeal to younger

people and convey its full range of services. Its many and varied fundraising and awareness initiatives include Brew Monday, which aims to turn ‘Blue Monday’ the third Monday in January, on its head by encouraging people to have a chat and a cuppa (it happened virtually this year). Last year, it launched the Feel Good Book Club, to encourage self-care and raise vital funds. This year, it hopes to launch the fifth phase of its ‘Small Talk Saves Lives’ campaign, together with the rail industry, to empower the public to save lives on the railways and beyond. It is also planning the next phase of ‘Real People, Real Stories’, which focuses on encouraging men to open up.

For all this, says Bentley, ‘there are things I want us to get better at’.

She has three key priorities.

‘We need to be available to people where and how they want us,’ she says. People can now contact Samaritans via email, and it is trialling a webchat service.

“I only go into charities where I genuinely believe in what they do and to which I have something valuable to add”

With service demand unlikely to wane any time soon, the charity is also seeking to attract new volunteers (there are currently around 20,000) by offering less onerous time commitments – such as fortnightly or monthly shifts.

Bentley also wants to address public perceptions of Samaritans, which is still widely believed to be a telephone helpline service for people who feel suicidal. In fact, just one in five calls comes from people who have suicidal thoughts, with the majority experiencing a range of emotional distress, from loneliness, isolation and hopelessness, to fears about losing their jobs, to feeling unable to cope, to being a burden on family and friends. ‘The aim of Samaritans is to stop people getting to the point where they want to take their own life,’ she says.

The charity's 'Real People, Real Stories' campaign focused on men's mental health. Samaritans research with men found that 42% felt that pandemic restrictions had a negative impact on their mental health

Samaritans offers face-to-face help, too – in the community, at music festivals, and even in prisons, where listening is done by trained fellow prisoners.

Bentley has won numerous awards, including, in 2019, the *Charity Times* Outstanding Individual Achievement Award. The judges praised her "unique leadership style – honesty, humour and empathy – passion for social justice – and "the culture of transparency and trust" she engenders in the organisations for which she works.

Judith Moran, chief executive of Quaker Social Action, was one of those judges.

She says: "Julie has no ego. She is very confident in her own leadership but characterises herself as "an Essex girl made good". Her humour and humility help her broker relationships."

Bentley believes her passion for justice was born at secondary school, when, "despite being terrified by the prospect," she decided to stand for the position of head girl. From a working-class background, she was raised in "a very loving family" but spent most of her youth "extraordinarily insecure, and nervous of my own shadow".

She stood for head girl to challenge the assumption among the students that the most popular girl would win the laurels. "That fired something in me: it didn't seem fair. Surely it should be the person who would do the job best." Being elected was a pivotal moment: "I felt I" found my purpose, I made a difference" and I became a lot more confident."

> **"Lots of people are finding it extraordinarily difficult. People who are already disadvantaged are struggling more"**

Structural change

In the first quarter of 2020, MEL Research conducted a study on behalf of Samaritans to gauge how beneficial the helpline was to callers. While the majority felt less lonely, more hopeful, and better able to cope as a result of the call, there was little lasting effect on those with suicidal thoughts. Given the complex needs of many callers, this is unsurprising. But it raises the question as to whether Samaritans can ever be more than a sticking plaster on the running sore of growing societal inequalities.

"We are so much more than a sticking plaster," insists Bentley. "People tell us time and time again that reaching out to Samaritans has had a lasting and positive impact on their lives. But that is not enough on its own. We need to try to change the structures and systems that create the scenarios in which people's wellbeing is damaged in the first place."

Samaritans works closely with policy- and decision-makers in government, and the focus of Bentley's conversations at the moment is the need for what she describes as "a properly-funded long-term recovery plan around people's mental health".

She says: "Everyone is affected by this pandemic – from young children, who are forming a concept of relationships through the lens of social distancing, to children and teenagers who are missing out on school, university students struggling with isolation, parents trying to juggle jobs with home schooling and looking after ageing parents, and so on. All these things take their toll."

She pays short shrift to any suggestion that we are building

resilience. Lots of people are finding it extraordinarily difficult, she says. And people are not experiencing this equally. People who are already disadvantaged are struggling more.

The mental health impact of the pandemic will be huge and long-lasting, she warns. Data suggests that suicide rates have not risen over the past year, but we know that suicides increase during recessions.

Any mental health recovery plan needs to address a range of societal issues, she insists, including criminal justice, housing, employment and, of course, mental health services.

Loneliness and unemployment are two of the most significant worries among people who have sought Samaritans' help with pandemic-specific issues over the past year (around one in five of all callers), but lack of access to mental health services, just when they most need it, is also a huge issue.

People with acute mental health needs ring us at 3 o'clock in the morning because they have nowhere else to go, says Bentley. We know that people with a diagnosed mental health condition are five to 15 times more likely to die by suicide than other people.

The other two groups of particular concern are young adults (suicides among women under 25 have nearly doubled since 2012); and middle-aged men (particularly those on lower incomes), who are at the highest risk of suicide.

Firm foundation

To address the deep and complex root causes of the problems people experience, Bentley believes that working together with other charities is more powerful than ploughing a lonely furrow despite growing competition in the sector for the donor pound.

You have to collaborate and co-operate, otherwise you waste time and resources in duplicating effort, you lose focus and beneficiaries suffer, she says.

She works hard to forge alliances and foster synergies and when she and her team develop the new strategy at Samaritans, they will focus not just on what they should be doing, but also what they shouldn't be doing – because someone else is doing it better.

In forging such alliances, she builds on firm foundations. She's always been at pains, says Moran, to encourage, support and look out for people – both those lower down the career ladder and peers in the sector: "There is a whole swathe of leaders who are very grateful for the support and encouragement Julie has shown them over the years."

This support and collaboration are part and parcel of her humble and authentic leadership style. Bentley freely admits that the MBA she did, funded by a legacy from her mother, helped not a jot.

Before she died, more than 20 years ago, Bentley's mum admitted to her daughter that she used to worry a great deal about how she would get on in life, given how shy and nervous she used to be. What would she think if she could see her now? "I think she'd be a bit gobsmacked," she says.

Bentley is not at all shy these days. "But I still get anxious and suffer from imposter syndrome, and I don't think that's a bad thing because it keeps you humble," she says. She's open about this, to encourage others: "People might assume I find it all easy and natural, and often I don't. Leadership is really tough and you have to be resilient and it's fine to acknowledge that, because we're all human."

Samaritans launched its 'Feel Good Book Club' in 2020 to promote self-care and raise funds

Forming the best connection

When research methodologies meet their participants, researchers must ensure that this connection between mode and individual creates the best landscape for insight – but this comes with challenges. Elen Lewis **reports**

There are at least three things the market research industry can agree on after surviving more than a year working through a global pandemic. One: researchers have become more nimble and agile than ever to ensure different (virtual) research modes create high-quality data and insight. Two: online qual has become a distinct research mode in its own right, with new rules and boundaries. And three: "You're on mute, Karen" has become a daily reality for many online moderators, illuminating the connection between how people interact with research and the quality of the resulting insight.

The way in which people interact with different research modes was an issue way before Covid-19 stepped onto the world stage, but the pandemic has unquestionably become a catalyst for accelerating digital transformation.

"This whole situation has seen the industry challenging boundaries with an appetite for change,"

> "We should always innovate in the ways we gather evidence... you start with the old world, but then you need to evolve"

says Christian Dubreuil, senior vice-president, client solutions, Schlesinger Group. "But we should always innovate in the ways we gather evidence. Yes, there are tried and tested methods, but we should be challenging briefs and looking at more innovative methodologies to solve client issues. It's about learning what each mode is best for – you start with the old world, but then you need to evolve."

Whether they liked it or not, researchers rapidly accelerated their understanding and effectiveness of new virtual research modes over the past year.

"Qualitative research was already experiencing a digital revolution," says Thomas Prosser, research director, qualitative and innovation at Kantar. "But I'd equate this with what's happened with online retail and e-commerce during Covid-19 – suddenly, we've leapfrogged in terms of uptake and openness."

Shifting modes

When the pandemic took hold in spring 2020, researchers had to shift modes swiftly. Many important tools in a qual researcher's toolkit – large co-creation workshops, escorted shopping trips, face-to-face focus groups, meeting people in their own homes, and literal observation – were impossible due to social distancing restrictions. Similarly, many face-to-face interviews, and many telephone quant surveys, could no longer take place.

Martin Lee, co-founder, Acacia Avenue, says: "When the pandemic first struck, all our commissioned projects that would have involved being in a viewing facility were affected. At a strike, they all had to move online at great speed. With one client, we shifted modes from a large focus group to pairs and triads. With another job that involved workshops, we shifted to one-to-one interviews."

The Ipsos Creative Labs team faced a similar challenge of having to shift modes, says Adam Tornabene, vice-president, early stage operations and logistics at Ipsos. "Historically, we were a face-to-face quant/qual method/team. When the pandemic first hit, we pivoted using a standard online survey with separate qualitative groups. While this method worked, it was lacking our founding principles: collaboration, speed

and learning quality, so we knew we had to keep innovating. Where we ended up was a virtual replication of our face-to-face tool, called a Virtual Lab, where we conduct a live online quant survey with a focus group directly following with the same respondents," he says.

While technology has become a saviour for many projects, for those insight briefs looking to better understand audiences who don't have access to tech, shifting to virtual modes was a challenge that required reshaping methodologies.

In rural India, research consultancy Basis set up a video screen in a Covid-safe venue, to which participants could travel to be interviewed by a remote moderator, with one other member of the team operating the laptop. "We normally would have gone in person," says Charlotte Smith, head of qualitative research. "That's been a real challenge – how do we talk to people without access to mobile internet? We had an elaborate set-up in rural India, but it worked really well. It taught us that, sometimes, we have to take a leap of faith."

Similarly, in the Philippines, Basis ran telephone interviews and, in Ghana, moved away from online focus groups to one-to-one interviews. "I couldn't watch every single interview," says Smith, "so we analysed the transcripts. Without the physical implement of people in our memories, we had to use structured analysis grids to cross-compare each interview."

Challenges – from old to new

Simply shifting focus groups online can damage the quality of data. Instead, researchers needed to view virtual focus groups as a new research mode, with fresh rules of engagement to optimise interaction with participants.

"Qualitative research is such a skilled discipline," says Dubreuil. "Researchers who normally use all five senses are having to hone two in the online world. It creates a whole new bunch of challenges. It's tough to orchestrate and tough to moderate."

Researchers can no longer read a room – or, indeed, read individuals' whole body language on screen. Learning how to make people feel comfortable, and prevent participants from talking over one another, are new moderating skills with online focus groups.

"There was a little trial and error at first," says Prosser. "Everyone had to learn how to engage in digital conversation, but people have become comfortable with the interface. Our biggest adaptation was in terms of moderation."

Fitting the old modality into a new approach doesn't always cut it online. In the early days, before adapting virtual groups, one researcher noticed that a five-person online focus group wasn't generating the same quality of conversation that they'd have in person.

"The moderator has to say stuff they would never have to say – things like 'during this conversation I'll have to ask you to speak, and I'll be inviting you to take turns'. It's hard for participants, because it's not as fluent. Some of the natural stuff they might do in a room, such as laugh or make a small interjection – for example, 'yes I agree' – can't really happen online."

Focus groups need to be much smaller in the virtual

Understanding group and individual identity in Zoom vs face-to-face research

The Nursery compared three research modes – virtual focus groups, face-to-face focus groups and chatrooms. It used the small window in the summer of 2020 to run Covid-safe masked groups in a Wimbledon hotel room. The researchers were interested in:

- Difference between group and individual identity and how that was expressed
- Self disclosure
- The polarising and conformity of views.

The researchers found that individual identity was maximised in virtual focus groups, with participants comfortable in their home surroundings and more empowered to express their own opinion without worrying about someone else in the group disagreeing.

In contrast, in the face-to-face focus group, even with masks on, group conformity was everything. They noted that, while wearing masks, participants weren't hiding behind them, but using exaggerated body language to emphasise a point.

During virtual focus groups, researchers had to work hard to maximise the group's shared identity, by calling out similarities and creating a more dynamic energy. In face-to-face groups, it was important to pull out the individual.

In chatrooms, the group was harder to control. Text encouraged people to take a more forceful stance, as if the typing detached them from their own words. Despite this, however, there was bonding within the group with lots of LOLs [laughs out loud] between participants.

> "Some of the natural stuff participants might do in a room – such as laugh or make a small interjection – can't really happen online"

environment, with most agencies suggesting figures of around three or four people maximum. "It is definitely harder with more people in a group, as it becomes a series of siloed individual responses," says Pauline McGowan, researcher at The Nursery.

Different approaches

The chat box is taking on a new role within virtual focus groups, encouraging people to build on their ideas and form connections with other participants. It's also helping researchers to discover more about participants' inner thoughts than they might reveal in person. "Interrupting, [waiting for] permission to speak, and voice lag are always awkward on video calls, so we encourage people to use chat boxes and text streams to indicate agreement, or express a new thought we can pick up on," says McGowan.

Dubreuil believes that bulletin boards, where participants build on thoughts and responses over a longer time period, are helping to fill the gap of

real-world focus groups. This is the space where participants might have shared a joke, agreed with one another, or completed someone else's sentence.

"Bulletin boards have always been there – when we were looking at a product test over a few weeks, for example, or a longitudinal study – but now we're using them for more of a deep dive."

It's also critical for the industry to bring contemporary use of modes into research, such as social media, argues Dubreuil. "We need to reflect real life and make it a more authentic experience for participants," he says.

He cites social media listening for segmentation and measuring the impact of a new product launch as a mode that's growing in significance. "It's about looking at social sentiment and using algorithms to group what it really means around engagement and key words. It's about using insights that are already there and running analytics to get a wider appreciation of the subject."

Similarly, Basis discovered that deep insight could be generated by tapping into the WhatsApp dynamic, where people already feel at ease. During the pandemic, Basis trialled WhatsApp as a qual platform for a digital-only study of women in Nigeria. It believes it learned more via WhatsApp than it would have done in a face-to-face group, because the women were already using the platform for commercial and social purposes, and felt relaxed in this environment.

Discourse analysis has also been key for researchers looking to put transcripts under the microscope for deeper analysis and insight. "Discourse analysis looks at the way people subconsciously use metaphor to describe their relationship to the world, and these can change subtly in times of flux. It's helped us to understand issues such as fear, anxiety, wish fulfilment or desire in the pandemic," adds Acacia Avenue's Lee.

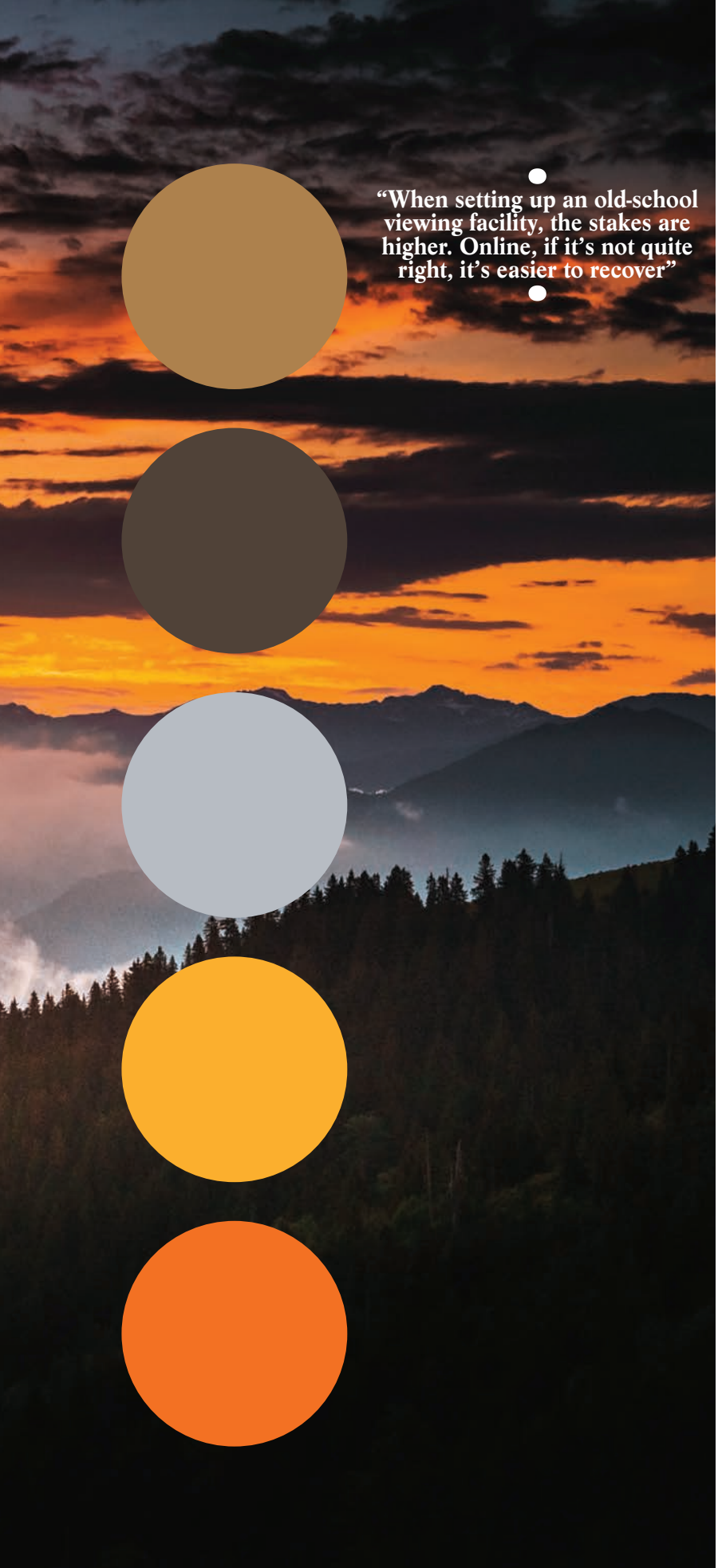
Fluid and nimble

Mixing research methods – focus groups with ethnography, or semiotics and one-to-one interviews – is nothing new, but everything is more nimble in a virtual world.

Kantar's Prosser likes the fact that there is more fluidity during the qual process than there used to be. "When you're setting up an old-school viewing facility, the stakes are higher. But online, if it's not quite right, it's easier to recover," he says. "If we do an online community, we can get back in touch with those people. It's less about the quality being awry and more about how we can keep building on different learnings and methodologies to extend our insight. This is how we should work anyway."

Many one-to-one video interviews are now naturally falling into ethnography, with people grabbing props to illustrate a point. Basis's Smith recently conducted a project for a financial client researching super-high net worth individuals in the UAE, Singapore and China. "Normally, we would have visited in person," she says. "But that audience is very mobile and hard to get hold of. This time, we could speak on a video call in a relaxed environment."

A shift towards online quant, away from telephone and face-to-face interviews, has inevitably sped up over the past year. Unilever in China, for example, accelerated its process to make all its brand tracking



"When setting up an old-school viewing facility, the stakes are higher. Online, if it's not quite right, it's easier to recover"

> **"It's more important than ever that surveys manage people's energy levels by giving them engaging formats, conjuring real-life environments"**

digital. However, moving from face-to-face to online surveys can bring its own set of challenges, especially for tracking data – and especially when a bonus for a CEO is based on a Net Promoter Score score and it changes.

It's well documented that people answer online surveys differently, as Pete Cape, global knowledge director, Dynata, explains: "People answer questions differently online. It provides completely different data. If I'm being interviewed by you, I see you and I have to look good to you. I start to think about giving you the answer you want to hear. It's not people lying; it's a human bias, a desire to please. No-one really concerned themselves with social desirability bias in the past because we couldn't account for it. Now, it's well known. We can't account for it, or change it, but we interpret answers in a different way. It's a different new truth to deal with."

Hence, some more personal topics, such as financial habits and sexuality, tend to work well in online quant. These are issues about which people tend to be more guarded and the anonymous environment of an online survey can make it easier for them to respond more honestly. Similarly, a written verbatim response in an

online survey might be more crafted – and sometimes more poignant – than that which might be elicited in a verbal conversation, suggests Dubreuil.

Additionally, an interviewer cannot help people completing online surveys with a prompt, as they might do on the phone or face to face. There tend to be more "don't knows" in response to questions online.

Cape notes that people react differently to scales in an online survey, and no-one quite knows why. "If you move from an interview to an online survey, your scores tend to move towards the centre of the scale. This might be related to an honesty factor; if I ask a question, you might just have a go... it results in different data."

Quant interviewers are highly skilled in using humour and other techniques to hold attention, but attention spans for online surveys are much shorter. Lou Horner, research director, Acacia Avenue, noticed that the quality and quantity of open-ended response in quant research markedly improved in the first lockdown, but this enthusiasm tailed off as fatigue set in, "to the point that we are having to put a forensic lens on data quality", she says. "This is on the questionnaire writer, too, though. It's more important than ever that surveys manage people's energy levels by giving them engaging formats, conjuring real-life environments and decision-making processes."

It's a lot faster to complete a survey yourself than to listen to someone else. Quant experts reflect on whether this is reading time or thinking time. How much thinking is being done? But speed can also be an advantage in this new reality.

"The mobile phone has become the epicentre of research activity," says Jon Puleston, vice-president, innovation, Kantar Profiles. "Before lockdown, I would expect a 24-hour turnaround for 500 people. Now, I can send it out, make a cup of tea, and come back to 500 completes. I have to include quotas to ensure that I'm also hearing from people who are too busy during the day."

Cape, who is involved in the Market Research Society's work with panel companies on mobile survey optimisation, points out that mobile surveys have a higher dropout rate than those on desktop. "We're getting better at this, but we need to redesign questionnaires to make them easier to fill in on a tiny screen while maintaining comparability with previous surveys," he says.

Puleston adds that emerging technologies in this space will grow in importance, such as linguistic taxonomy mapping, where researchers will be able to analyse open-ended answers en masse, using tech analytics.

He also predicts a rise in voice-in-quant online surveys – where people might be able to listen to a digital survey and then respond by speaking. He thinks the chance to listen and speak in response to a question, rather than read and type, will increasingly be offered to quant participants. It's likely to improve the richness and quality of data in two ways: by offering participants a choice in how to respond, and because talking might create more data.

Voice technologies such as Phebi (winner of best technology innovation at the MRS Awards 2020) use artificial intelligence to analyse speech from participants. This approach could lead to richer data from online surveys, as talking can lead to longer answers, and may solve the current issue of mobile surveys not working as well as they should. Here, the mobile platform becomes fit for purpose; Phebi points out that talking is faster – and easier – than typing. While typing on a mobile with one finger generates (on average) 29 words per minute, talking at a relaxed pace generates 125 words per minute.

There's a bigger issue at the heart of quant research in the Covid-19 pandemic, mentioned by a number of

Keeping calm and carrying on

- Expect the unexpected.
- Don't immediately jump to a data quality conclusion if surprised. Take a step back. Has the pandemic affected what I'm looking at? What are the big societal forces that might be affecting it? Do I need to change my thinking in the way I analyse this data?
- Don't be tempted to think that, just because circumstances have changed so much, people have. Human wants and needs don't change anything like as quickly as circumstance does.
- Embrace the fluidity of this brave new world. Lean into the speed, the flexibility, the freedom to evolve stimulus. Encourage participants to share glimpses of their home life.
- Make the virtual world work for you. Evolve methodologies and techniques. Mix things up. Enjoy the opportunities it brings.
- Beware Zoom/screen fatigue.
- Now is the time to experiment. Don't fall into the habit of force-fitting traditional research modes into a virtual world. Consider every client brief in context to get the best quality data.
- Enjoy the wider client audience and the democratisation of your research in this new reality, where online meeting rooms can be as big as you want them to be.

practitioners, and it's about human behaviour and people's world view. "The bigger question is, what will happen to my data if people aren't behaving the same way? Should I still be asking the same questions?" says Cape.

Kantar's Puleston is trying to understand whether people's personalities have changed during the lockdown. "People are appearing more extrovert on paper, but that's because the questions are centred on things such as 'I like my own company', which has a different nuance in lockdown. So, it's the question that has to change. But we're also seeing genuinely fundamental changes in people's world view – they're more communitarian in outlook, for example," he says.

The future looks...

The research industry, not through choice, has moved 10 years in just one in terms of digital transformation and experimentation. Practitioners should return to their roots as curious investigators, striving to transform these new virtual research modes into powerful tools, and ensuring they select the right modes for each brief.

For example, while virtual focus groups are here to stay as a new methodology in qual researchers' toolkits, they don't sound the death knell for face-to-face research modes. "Is the qual toolkit as good as it was before? No, but it's good enough. Tools such as large workshops and meeting people in their homes were devised for a reason. I can't honestly say it is as good as it ever was; it's only as good as it can be at the moment," says Acacia Avenue's Lee.

For Dubreuil, it's important for the industry to look at how it might approach client problems in a different way. "The client wants to get from A to B, and our job as researcher is to make sure the engine's working well. We need to look at the way we collect our data, and the benefits and drawbacks of each approach, so we can better understand the biases and strengths of each research mode."

Staying connected with asynchronous approaches

In 2005, working for Synovate, I transitioned some of the first face-to-face quant trackers online. We used propensity weighting scores and the innovation adoption curve of Rogers to balance our samples, to get a more representative response online. The three areas of focus were:

- Understand the audience and source bias to either compensate or deliver representative response (beyond demography)
- The questionnaire instrument – moving from a live 'synchronous' response to an interactive, self-completion, 'asynchronous' response
- Using the modality to improve engagement and response – think early gamification and 'flash' tools.

Fifteen years later, and digital quantitative methods are the mainstay; however, digital qualitative has only just started to explode, for obvious reasons. The transition principles are still the same. We need to ensure recruitment is representative, and understand the tools available for online qualitative, and how to optimise participant engagement in the modality in which we are interacting.

We have transitioned very quickly to a world of video calls; we bring work meetings into our homes, and our approach to personal virtual connection is very different from in March 2020. I message more one on one, and blend face-to-face online connection when appropriate.

Our approach to digital qualitative is no different. There is a place for online focus groups, and great benefits, but what about the other tools available? It's natural to take an 'offline' approach and replicate it online, but when we focus on using the online modality and all of its strengths, approaches start to change, and clients see the benefit.

Asynchronous methods – mobile qual, communities, online journals, discussion boards, digital ethnography, and video diaries – offer exceptional solutions to optimise the insight of a project. Online focus groups mean we can see and hear participants, see facial and (some) non-verbal cues; clients can join in real time and researchers can see participants in their own environment. They can be logistically challenging, however, and transcripts long and unstructured.

With asynchronous methods, everyone participates in their own time; you can collect a vast amount of information over a series of sessions; you can cover more content; and – with a longer engagement period – there is increased opportunity for context and becoming comfortable with the researcher. You can also employ a wider variety of questions, take time for more considered probing, and encounter fewer technical issues.

Asynchronous approaches mean non-verbal cues aren't available. So, more thought in approaching the guide design, and more upfront effort, is required. What remains essential is ensuring we also focus on that moment of researcher participant connection – the environment, the content, the benefits and limitations of the interaction – to optimise the insight.

Christian Dubreuil is senior vice-president, client solutions, at Schlesinger Group

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Making a **play**

Understanding the emotional impact of child's play, and what issues such as sustainability mean to kids, are high on the insight agenda for Mattel's Michael Swaisland**. By** Katie McQuater

Video calls must be *de rigueur* for Michael Swaisland. Based in Germany, as head of insights for Europe, Middle East and Africa (EMEA) at toy company Mattel, his role covers a huge, diverse geographic area.

When we meet virtually, the set-up has become the norm across the board. While video has simplified cross-border communication, however, understanding multiple markets, where tastes, cultures and languages vary, is still a complex job – and, for Swaisland, it's increasingly about – listening, rather than asking – particularly this year.

The EMEA insights function at Mattel is split across two tiers – in-country local market experts, and a regional layer focused on core pillars, including consumer, shopper, media insights and advanced analytics.

From an insights function perspective, because we work across the region and locally, our focus is on how to get the best impact in-market for the countries, but also feeding back to global to say what they need to do differently for our region," says Swaisland. "Because it's not the same as America, let's put it that way."

Mattel operates in more than 100 markets globally, and its portfolio of toy brands – including Barbie, Fisher-Price, Hot Wheels and Thomas & Friends – is just as diverse as the countries it covers.

The variety of markets and products drives a lot of the bigger insight projects run by Swaisland's team, as it seeks to understand specific implications by market or region.

The issue of sustainability, a topic of increased focus for large multinationals, is one example. Globally, Mattel's head of sustainability, based in the US, leads initiatives in the space, but, for Swaisland, the focus is on establishing what's different in terms of parents' and children's – in Europe.

"Where we've a large focus on what we can do better and what more we can learn around sustainability, not just from a product-back perspective, but what it means to kids," says Swaisland.

"We've done some work primarily in the Nordics, because it is more advanced in that area than most of the region – kids living in that part of the world have 10 bins for their recycling, whereas most countries have one to three."

The research – which was not carried out for one particular brand, but to inform Mattel in general – also sought to explore how children are learning about sustainability; whether their knowledge comes from parents, teachers or elsewhere.

"YouTube has a huge impact," says Swaisland. "They're hearing about things going on in the world, told from the perspectives of other kids. It's a valuable lesson for us; in the world of kids, there's so much that comes from each other – good or bad. We need to harness the things that are good."

The Nordic study will eventually inform how sustainability can be embedded into Mattel's strategies and broader goals, as well as influencing how the company conducts more research in the space.

Capturing imagination

Another area of focus for Swaisland's team is driving more purpose in Mattel's brands, particularly Barbie, which has had an increased drive towards inclusion in recent years, adding gender-neutral and disabled dolls to its product line. In early 2021, it launched Maya Angelou and Eleanor Roosevelt dolls as part of its 'Inspiring Women' series.

"We do a lot of work looking at who are icons and role models – who are the people that kids either do know or should know because of the impact they've had on society," says Swaisland.

Swaisland's team has done a lot of work on Barbie to explore the benefits of playing with dolls, working with the Cardiff University to conduct a neuroscience study to explore what's happening in children's minds while they're playing – a step into academia that was new for the company.

The paper – 'Exploring the benefits of doll play through neuroscience' – was published in the *Frontiers in Human Neuroscience* journal in October 2020, after two and a half years of work.

For Mattel, the research focused on setting a benchmark for the benefits of play. "We know it works from our observational work over the years – we can see how kids act out stories when they're playing with dolls and go into another world – but there wasn't any academic proof to suggest something was happening."

One of the findings was that playing with dolls activates the posterior superior temporal sulcus, the part of the brain known to help with social information processing, such as

"In the world of kids, there's so much that comes from each other – good or bad. We need to harness the things that are good"

Dr Sarah Gerson, senior lecturer at Cardiff University's Centre for Human Developmental Science, conducting the Barbie doll play study

empathy. This occurred even when the child was playing alone, and the effect was equal for boys and girls.

It was a huge finding for Mattel, explains Swaisland, as it helped to validate the hypothesis on the importance of play. "A lot of the time, parents in the past would say to us: 'I don't see the benefit, I don't see what comes out of play because it's invisible.' Imagination is in that child's head, it's part of their development, but it's not like drawing or building a car; those are physical manifestations of development.

"But we knew this hidden learning and development was critical. EQ [emotional intelligence] is becoming so much more important from an adult's perspective, and if we can foster that more in the kids of tomorrow, for us that's a great win."

After the academic study, Mattel commissioned a survey with parents [see boxout] to explore the implications and relevance of the findings.

The results of the Cardiff study are being used to inform Barbie's brand communications and how it conveys the empathy message. A social media campaign in December focused on "bringing the information from the research to life", says Swaisland, but he admits it will be a "slow drip process".

"It's not something you can convince people of overnight, but I think the importance is that the message is rooted in science; it was impartial; all decisions were led by Cardiff, we were just a recipient. We knew the results could have come back and told us nothing. That's the risk you take with academic work – it's not about "here's a questionnaire, answer some questions", it's about fundamental human truths."

Building curiosity

Swaisland feels that the closer the insights team stays to children, the more it can build curiosity within the business. One of its aims is to encourage people to ask more questions, as opposed to merely requesting sales data or a consumer profile. "Know your consumer, know that child, know that parent. That's what we're trying to get more focus on," he says.

Swaisland sees research as an "enabler" for the team to drive impact, doesn't want it to be "gathering dust in a folder somewhere", and is interested in how to be discerning with research, and not simply sticking to "tried and tested methods".

One of the EMEA insight function's priorities has been "optimising" people working in the team, and leveraging its specialists across the region, rather than generalists "trying to do everything", according to Swaisland.

In line with this, Mattel has changed how it works with research suppliers over the past couple of years. While it still works with large multinational agencies, it now has a broad portfolio of suppliers, including individual specialists in a given space – for example, empathy, or small qualitative agencies that are "really good at diversity and inclusion", says Swaisland.

"Emotional intelligence is becoming so much more important... and if we can foster that more in the kids of tomorrow, that's a great win"

Like many, Swaisland saw hugely increased demand on his function as a result of the pandemic, as the business dealt with uncertainty. With the behaviours of the year not following normal patterns, the team was in continual dialogue with finance, sales and marketing, and supply chain functions – often having conversations with people they might not have engaged with frequently in the past – to understand more about what might happen, particularly around the toy industry's all-important fourth quarter.

"When we were lots of questions around how people would behave," says Swaisland. "What we did through the year was try to hypothesise – would people shop earlier? Would Christmas take place differently – if you're not seeing friends and family, would you buy less stuff? A lot of different scenario planning went into that."

He adds: "The main thing we've probably learned from the past year is resilience. Insight teams are at the focus and centre of a lot more decisions."

Beyond Mattel, Swaisland would like to see the insights community exploring how to foster more change in the world of research – and wonders if the industry places enough focus on the diversity of the function, in terms of the individual roles involved.

"When we are lots of specialist roles today, and there are probably insight roles coming up in the next few years that we don't expect yet – in AI, for example. How do we reframe what the market research world is?

"We often think our stakeholder is marketing and sales, but actually it's the full organisation, and I think we need to make sure we, as individuals, are realising that."

Who cares about empathy?

To understand the relevance of the findings of its neuroscience study with Cardiff University, Barbie commissioned OnePoll to conduct a survey of 15,000 parents across 22 countries in July 2020.

The research found that 91% of parents ranked empathy as a key social skill that they would like their child to develop.

While only 26% were aware that playing with dolls could help with these skills, 74% claimed they would be "more likely" to encourage their child to play with a toy if they knew it would help them develop social and emotional skills.

Parents were also worried about their children's social development skills during the pandemic – 70% of respondents reported that they were concerned about how the isolation may affect their child and their interaction with others.

Swaisland says the survey helped to "solidify" the results of the Cardiff research. "More than 90% of parents felt that developing empathy was really important to developing their children's futures, but a much lower percentage believed that playing with dolls could actually develop that.

"So, it shows that it's something that we need to really use over the years to help them understand how they can improve this."

After the research, Barbie launched an online hub – including resources for parents, caregivers and children – aimed at assisting children's social processing skills.

Shifting gears

Insights are central to the AA's decision-making – but can they help the breakdown specialist navigate a period of upheaval in the car industry? By Liam Kay

If your car suddenly breaks down on a dimly lit, winding country road, there is a good chance the AA will be your first call to get you back up and running. Since 1905, the motoring organisation has been rescuing drivers of all kinds, acting as a de facto 'fourth emergency service'. As the age of the petrol car winds to an end, however, the company is at a crossroads, and insights are helping its shift to a new future.

When Robert Gruszka, senior consumer research manager, joined the AA in 2015, it was looking for a fresh start. The company has long been an icon of British motoring, but older customers formed a large part of its membership, and the company had been absent from television and radio advertising for a long time.

The biggest issue remains the radical changes on the horizon for the car industry. Electric vehicles, and the ban on sales of new petrol and diesel cars in the UK from 2030, threaten to shrink the roadside assistance industry. Add to this the move towards car sharing, leasing and other modes of transport.

'We needed to put a line in the sand and re-establish ourselves – both in terms of consumer awareness and perceptions of who we are – but also define where we wanted to go,' says Gruszka. 'We were talking in a language that was seen as outdated.'

Strategy

Gruszka is the only member of the AA's consumer research team, and reports directly to the group marketing director. His status as the only pure researcher at the business means he is dependent on the use of contractors and external agencies. There are also separate insights and user experience teams, and a customer journey insights team.

Insight sits within the marketing department at the AA, and has a predominant focus on brand and strategy, as well as marketing communications issues such as creative development insights and market tracking.

The insight function may be small, but it plays an important role in the strategic direction of the company, argues Gruszka, because of the AA's relatively flat structure and the way the senior leadership team uses insights.

'When I joined, business decisions

were being made off the back of several focus groups, and we decided to embed a thorough programme of audience understanding to drive our strategic decision-making across the business," says Gruszka.

"Most strategic decisions are made with the view that we kick off with insights and research, whether that be development of a new proposition, optimising messaging, or changes to strategy. That, hopefully, doesn't stifle the spark of creativity from colleagues, and people still make decisions based on their expertise and industry specialism and knowledge. But it is all supported through a lens of insight and consumer response."

The AA's segmentations now have access to more than 200 behavioural attributes, and a mixture of internal and external attitudinal survey data. The organisation recently updated its segmentation to better understand the alignment of its membership and customers with new business objectives.

According to Gruszka, the new segmentation brought to life, through direct consumer experiences, the role of the AA brand as an enabler for different aspects of people's driving lives. As it is a membership organisation, the AA can also use its internal databases for research.

The segmentation update, conducted before and during the first Covid-19 lockdown in the UK, has allowed a more expansive approach to sharing insights internally, says Gruszka. The nature of the pandemic restrictions, which enforced home working for a large section of the population, meant the results had to be delivered in smaller regular updates for relevant internal stakeholders. "It worked really well, as you could deliver dedicated insight into a specific segment, to a wider range of colleagues, in bite-sized chunks in videos and presentations," explains Gruszka.

"We needed to put a line in the sand and re-establish ourselves, but also define where we wanted to go"

Strat7 ResearchBods runs the AA's consumer panels (see boxout, "In the driver's seat"), and creative agency Adam and Eve supports brand strategy. Old Street Data Science also assists Gruszka on key strategic quantitative projects, and Boxclever and Savanta work on tactical and proposition-based activities, both quantitative and qualitative. One Minute to Midnight and Lucid are among the qualitative specialists with which the AA works.

The pandemic has presented opportunities to disseminate insight more widely. The organisation's Covid-19 tracker – which started as bi-weekly, but is now monthly – has been widely shared internally via email, and Gruszka has been working on a regular infographic that summarises insights around commercial and brand strategy discussions. He says: "I have been invited to various groups, Teams chats and local meetings that, in a face-to-face environment, I might not have experienced."

A changing world

The updated segmentation is a central part of the AA's modernisation. "Through embedding a new segmentation understanding modern drivers and the consumer landscape, it gave us the platform from which we could then start to build a relevant brand strategy and reinvent ourselves

into a modern brand that faced a younger audience,” says Gruszka.

The organisation has begun a further project focused on roadside member retention and brand messaging. The work involves researching the messaging and marketing around its roadside maintenance business, which accounts for two-thirds of group revenue. The research will examine the company’s roadside retention and acquisition, roadside product and direct response marketing communications, and target segments.

“As cars become more reliable and the introduction of electric vehicle technology means there are fewer parts that go wrong, breakdown is likely to recede,” Gruszka explains. “We need to look at other opportunities to support people across their driving lives, whether that be through suitable financial services – such as car leasing or smart leasing – or looking at car servicing and repairs as opportunities to continue our expertise.”

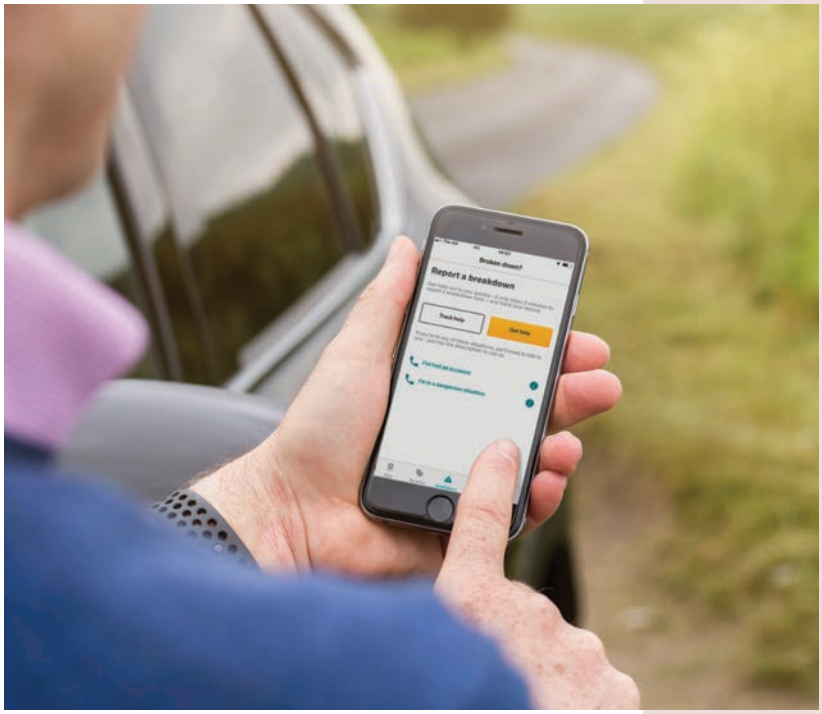
The changing world in which the AA finds itself also informed the ‘That Feeling’ campaign, produced with creative testing partner Acacia Avenue. While responsive to the pandemic and the end of the first lockdown in the summer of 2020, the campaign is the first from the AA that draws on other aspects of driving life, speaking more about helping customers to get on with driving, rather than reactions to accidents or breakdowns. It was the first advert from the organisation that did not feature a patrol or an AA van.

“We need to look at other opportunities to support people across their driving lives”

‘That Feeling’ has been the most effective AA brand campaign launch based on short-term business sales, the company says. It has been the most watched AA campaign on YouTube and had a 74% increase in positive engagement compared with the AA’s previous advertising campaigns.

These projects, including the That Feeling campaign, are building the narrative head of a campaign focused on the freedom of driving, according to Gruszka. While postponed until 2022 because of the pandemic, work has begun, with Murmur appointed to run a cultural exploration. Gruszka says his ultimate aim is to ensure insights remain core to decision-making at the AA as it grapples with the ever increasing commoditisation of the breakdown industry. “We are building up a body of work that is underpinning key strategic activity maintaining our category leadership,” he says. “There are opportunities as the brand plays out its vision for insight to be used much more broadly.”

The objective has been to speed up employees’ route to insight and allow



teams to speak directly to consumers through polls, online groups or other methodologies, as well as adding insight champions within category teams. In the meantime? It's about helping keep people on the road.

"Car manufacturers sell people the dream of owning a car," Gruszka says. "We are there to support people through the reality of ownership and maintaining the promise of freedom offered through driving."

In the driver's seat

Strat7 ResearchBods runs the AA's 20,000-member 'Passenger Seat' community. Elaine Morris, research director at the agency, says the organisation's vast membership has contributed to a diverse and active panel community.

"We had real aspirations when we set up the panel to make it as representative of its members as possible," Morris says. "With communities, you have to use them to keep them engaged, and we have to find topics that are relevant to them. It is really important we have the diversity in the audience, so when we do work it is as inclusive as possible."

The community is made up of a mixture of demographics and segments, and features weekly activities, including surveys and discussion rooms. Ad hoc research is conducted on "meatier" subjects, says Morris, but, at the moment, it is primarily used to track attitudes to driving during Covid-19. The panel can be supplemented with Strat7 ResearchBods' own community panels when required.

"The key thing has been about mapping attitudes," explains Morris. "It is looking at what behavioural changes will have a lasting effect. It is about the quality of participants, not the quantity."

The AA's 'That Feeling' ad, produced by Adam and Eve and launched in summer 2020, was the first not to feature a breakdown van

The birth of customer insight

The world has changed dramatically over the past 200 years. Data is now the fuel that drives business, identifying potential markets, shaping new products, and targeting would-be consumers. To understand where we may be heading next, *Impact* has partnered with *Significance*, the magazine of the Royal Statistical Society, to jointly publish a series exploring the past, present and future of the data economy. The first part tells the story of the birth of customer insight. By Timandra Harkness

Today's data-driven economy relies heavily on mathematics, statistics and computer science, but its roots owe as much to pragmatic trial and error as to pioneers of social statistics such as Adolphe Quetelet.

While theoreticians wrangled over how humans varied, and how to quantify this, those who saw the value of data in the nascent mass society were already collecting and using it.

The first people to treat public opinion as a form of data were newspaper publishers in 19th-century America, who used 'straw polls' of readers to anticipate election results. The *Harrisburg Pennsylvanian's* 1824 presidential election poll is often cited as the first political poll. It accurately predicted that Andrew Jackson would win the popular vote, though John Quincy Adams was ultimately elected president.

This straw-poll approach continued in use until the 1930s. Although newspapers actively went out to survey different groups in the population, they relied more on very large numbers of responses than on any statistical theory to accurately reflect the mood of the nation.

Meanwhile, America's flourishing mail-order market made customer information so valuable that letter-brokers bought and sold customer letters. Those letters, originally solicited by newspaper adverts or leaflets, might include not only names and addresses, but also useful details such as medical histories. In 1910, Louen Atkins, of Chicago, accused his former business partner James Rainey of taking data from his mailing list to poach a customer. The dispute culminated in Rainey shooting Atkins dead.

The research profession

In the early 20th century, this kind of ad hoc research began to take a more coherent form with the professionalisation of marketing. Market research pioneer Archibald M Crossley reports applying for a job with a Philadelphia advertising firm in 1918. "My prospective employer asked how I would like to set up a research department. I said: 'I would. What is it?' And his answer was: 'I don't know either.'"

Crossley did some research into research and found that many other advertising agencies had research departments already. The most influential among them was probably J Walter Thompson (JWT), founded in 1878, and trading today as Wunderman Thompson, part of marketing group WPP. Stanley Resor, who took over JWT in 1916, believed that human behaviour, taken en masse, could only be understood through statistical and scientific study.

Some magazine publishers also had research departments to help them attract lucrative advertising and make it more effective. Charles Coolidge Parlin, widely regarded as the world's first professional market researcher, was hired by the Curtis Publishing Company in 1911. His extensive research into entire sectors, first agriculture and then automobiles, produced volumes of data and analysis.

Duly informed, Crossley set up a research department for his new employer. After a stint in the research department of the *Literary Digest* magazine, he established his own research company in 1926. By Crossley's account, this kind of quantitative research started out partly as a sales technique for advertising firms, to help them compete for clients, but came into its own with the growth of mass media. Advertising spend in the US increased tenfold between 1900 and 1930, and clients wanted to know whom their radio – and, later, television – adverts were reaching, and to what effect.

Coming at the same question from another direction, Arthur C Nielsen set up a business to test the quality of conveyor belts and turbines in 1923, before applying similar methods to market research. As an engineer, Nielsen applied rigorous statistical techniques of probability sampling to new problems – such as calculating brand market share – and, later, to measuring broadcast audience habits.

A revolution begins

George Gallup revolutionised quantitative market research by bringing together statistics, journalism and psychology. The method he outlined in his doctoral psychology dissertation, '*A new technique for objective methods for measuring reader interest in newspapers*', transferred to human attitudes the method used by inspectors of wheat or water – testing a number of

1936

1940

1954

1957

Timandra Harkness is a presenter, writer and comedian, and author of *Big data: does size matter?*

small samples to assess the whole. While working as director of research for New York advertising agency Young & Rubicam, Gallup began to widen his focus beyond studying consumer responses to journalism and advertising. This sampling approach could equally be applied, he thought, to public opinion on politics and social issues.

In 1932, his research helped his mother-in-law, Ola Babcock Miller, to run as Iowa's secretary of state. In 1934, Gallup's predictions came within one percentage point of the congressional election results.

The final overthrow of the newspaper straw poll by more statistically robust methods came in 1936. Now running the American Institute of Public Opinion from a small office in Princeton, Gallup used the results of his surveys to produce a regular syndicated column, *America Speaks.*

Gallup challenged news magazine the *Literary Digest* to beat his methods with its straw-poll forecast of the presidential election results. He judged, correctly, that the *Digest*'s straw poll over-represented people with telephones and cars, who were unlikely to vote for Franklin Delano Roosevelt, the Democratic candidate. Gallup's surveys used a quota system to match the electorate demographically, and he correctly predicted a Roosevelt victory. The *Literary Digest* closed down not long afterwards.

The following year, Gallup polling arrived in the UK. Harry Field, a Briton who had worked with Gallup at Young & Rubicam, was despatched to the London School of Economics (LSE) to find a suitable leader for a British Institute of Public Opinion (BIPO) to mirror its American cousin. Field convinced research student Henry Durant to take on the job.

The role must have appealed both to Durant's political leanings and his lack of private means. The son of a warehouseman, he had won a scholarship to Christ's Hospital school and then worked as an insurance clerk before studying sociology at LSE. The £150 per year salary from the BIPO would help support him and his wife while they pursued their

academic research careers, and the prospect of giving the public a voice on social and political issues chimed with his left-wing views.[1]

With Durant in post, Field returned to the US to establish the People's Research Corporation, and then initiate the American Association for Public Opinion Research and the World Association for Public Opinion Research. Tragically, he was killed in an air crash in Paris before either was established.

The population of inter-war Britain was studied by a number of government bodies – not only as citizens, but also as consumers. The Empire Marketing Board, set up to promote the consumption of goods produced within the British Empire, segmented its audience according to social class and sex, placing adverts in the relevant papers, and distributing targeted posters and pamphlets to schools and Women's Institutes. It enlisted advisers from the advertising industry, notably William Crawford, whose 1938 report *The People's Food* ruffled government feathers with its finding that millions of British citizens could not afford to eat properly.

During World War II, the distinction between commercial and political polling became almost meaningless. Governments on both sides of the Atlantic took control of information, mindful of the need to know the level of public support for wartime policies and of the potential power of information delivered to the right audience at the right time.

In the UK, the government brought several research groups together as the Social Survey Unit, run by Louis Moss, who had been managing the BIPO. The unit directly employed researchers and social scientists to supplement official data, but also farmed out survey research to commercial agencies such as JWT's London branch and Britain's largest advertising agency, the London Press Exchange.

Random sampling methods, stratified for occupation, age, sex, and so on, produced tabulated data on vital issues, including bicycle use, attitudes to fuel rationing, demand for brooms, and cake consumption in private homes. From 1940, long-running surveys emerged from the Social Survey Unit's work. The National Food Survey, for example, ran for 60 years, until 2000, when it was merged into the Expenditure and Food Survey.

What people say and do

After the war, both flavours of public opinion – the commercial and the political – continued to be valuable. The Market Research Society was formed in 1946, with members from public and private organisations. Initially, it was a couple of dozen people meeting over lunch in Soho, but within 10 years it had hundreds of members and held its first conference in Brighton in 1957. Henry Durant was its first president.

Durant established his reputation, as Gallup had done, by correctly predicting the outcome of an election; his polling anticipated Labour's 1945 victory under Clement Attlee. Durant's background in social science and actuarial work proved a good foundation for innovation in polling techniques. He adopted Gallup's 'quintamensional design' – five questions designed to find out a respondent's knowledge about an issue, their level of interest in it, their attitude to it, reasons for the attitude, and strength of opinion.

As Durant's experience grew, he refined other aspects of data collection by survey – but he saw problems, too.

In a frank article for *The Incorporated Statistician* in 1954, Durant discusses practical issues in data gathering.[2] How, for example, would you discover drinking habits and consumption though a field survey? You could visit people at home, but unless you weight the responses, people who do not go out much will be over-represented. If you do weight the responses, the 'only home one night a week' group will be represented by the smallest sample, giving the least reliable results.

Home interviews could also elicit less accurate answers. "Husbands may not want their wives to know the truth about the amount they drink," says Durant. But if interviewers were, instead, to be stationed outside pubs, might "there not also be the danger that interviewers will tend to avoid the rough-and-ready types, who, in fact, do consume more than their due proportion?" asks Durant, reasonably.

Some of these problems were mitigated, to an extent, by the advance of technology. As more households acquired their own telephones, phone interviews began to take over from face-to-face surveys. Because each telephone number was linked to a specific household, randomised sampling became more practical and cheaper to execute, because the interviewer did not need to travel. Later still, the internet and smartphones provided easier, lower-cost ways to contact potential interviewees.

By that time, however, survey data collected directly by asking questions had competition. Data generated as a by-product of our everyday activities could, potentially, reveal far more about us than we would willingly reveal in words. All that was needed were the right techniques to analyse this data.

The second part of the series will be published in the July 2021 issue of *Impact*.

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A focus on experience

Recent years have seen a blurring of the lines between customer experience, user experience and market research. Do the three complement each other? By Liam Kay

In business, as the saying goes, the customer is king. Customer experience (CX), user experience (UX) and market research all focus on, in various forms, serving the customer. However, after a year of a worldwide pandemic tearing up old models of business, and as technological changes help flatten company structures, can – or should – the three disciplines be brought closer together?

Like three siblings, CX, UX and market research have much in common, but also have their own distinct approaches. Broadly, UX is centred more on the product and how customers interact with it, while customer experience deals with the public's interactions with the company, often focusing on removing friction in the customer journey. Market research tends to be broader, and more strategically focused.

Tools for the job

Charlotte Burgess, managing director of customer research agency C Space, says it can be useful to think of UX, CX and market research as being part of the same broad industry, but coming at customer service from different angles. "Where they do come together is in the service of creating a better experience or product for the end customer," she

says. “They all have a common goal and have different origins, and often bring a different perspective. They are complementary, but are not the same.”

Burgess feels that, in some ways, the three disciplines are converging, with CX and UX growing rapidly. She puts their increasing popularity down to their roots in the tech industry, and the exponential expansion of data – as well as its democratisation – in businesses such as food-delivery company Deliveroo, where the focus has been on increasing internal access to insight within a less hierarchical structure. “The challenge of the insight function is to tell a common story across that data, and to try to help organisations make sense of it,” she says.

Sarah Jousiffe, head of qualitative, closeness and insight engagement at Sky, praises the rigour and long-term thinking of traditional market research, while appreciating the benefits of agile and fast insights garnered from CX and UX work. Sky’s work on its “customer promise” strategy is a case in point – the project originated from CX, but needed market research support to provide the marketing, product and content required.

“It is about having the right tools for the right job,” she says. “If you are going to be spending multimillions on a new advertising campaign, you wouldn’t just test it on 10 people, and I do not think any UX researcher would say that was the right idea either. It is doing the right thing for the right purpose. We are all here to make sure that every decision is based on what customers are saying, doing and thinking.”

Long term vs short term

Some are more critical of CX and UX and their perceived focus on short-term benefits to customers ahead of long-term strategy and emotional heft in brand and advertising. Dom Boyd, managing director, UK (insights and offer) at Kantar, cites Ikea as one brand that has got the right balance, with a “beating heart” that runs through the business on issues such as sustainability. However, he worries others have it wrong.

“CX and UX are missing the opportunity to drive sustainable growth and value creation, as they are not baking in enough consistency in terms of brand value and memorability,” Boyd says. “In a world where emotions shape behaviours, experience makes memories, and memories make brands, they are missing the opportunity to be evocative. There is a festishisation of seamlessness and easiness at the expense of what drives sustainable long-term value – creating emotional reactions and memories.”

As Covid-19 speeds up a flattening of organisations and, in some cases, forces CX, UX and market research to co-exist within departments, Jousiffe argues that might not necessarily be a bad thing.

“A centralised market research function cannot do everything, but it could work out the relationship between all of those areas. You are all driving in the same direction rather than running your own races separately,” she says.

“Being a Jack-of-all-trades is not a good thing. There needs to be different disciplines that are separate, but they must work together as a community. We are all making customer-led informed decisions, and we need to be telling a joined-up story. The more contradiction there is internally, the harder it is for people to believe any of us.”

“We are all making customer-led informed decisions, and we need to be telling a joined-up story”

Burgess is also an advocate of using the different skills each of the three disciplines has to offer and allowing each to play to their strengths. “If you bring them all together, I don’t think you will get the benefit of all three of them, so you are missing out on whatever the advantages are in isolation,” she explains. “They operate on very different levels and are complementary. The risk is you have a team that specialises in only one area and has the disadvantage of only bringing that lens.”

The biggest impact of the pandemic might be in creating the space for people to reimagine how organisations are structured, suggests Boyd, with potential ramifications for UX, CX and market research. “As ecosystems become more complicated, there is a desire to simplify,” he says. “There is a strong cross-pollination between CX, UX and brands.”

Ikea is, again, a good example – the company has plans in place for long-term transformational change up until 2030. “There is always a role for optimisation, and there is value – but to do that at the expense of a transformational agenda is a huge, missed opportunity,” Boyd explains, adding that the pandemic has provided “permission to think freely and ask questions people wouldn’t have thought to have asked, or were scared to ask.”

“Data in itself is meaningless,” he muses. “Turning that into insight is an art that requires distillation, storytelling nous and strategic acumen. That is a rare and precious commodity.”

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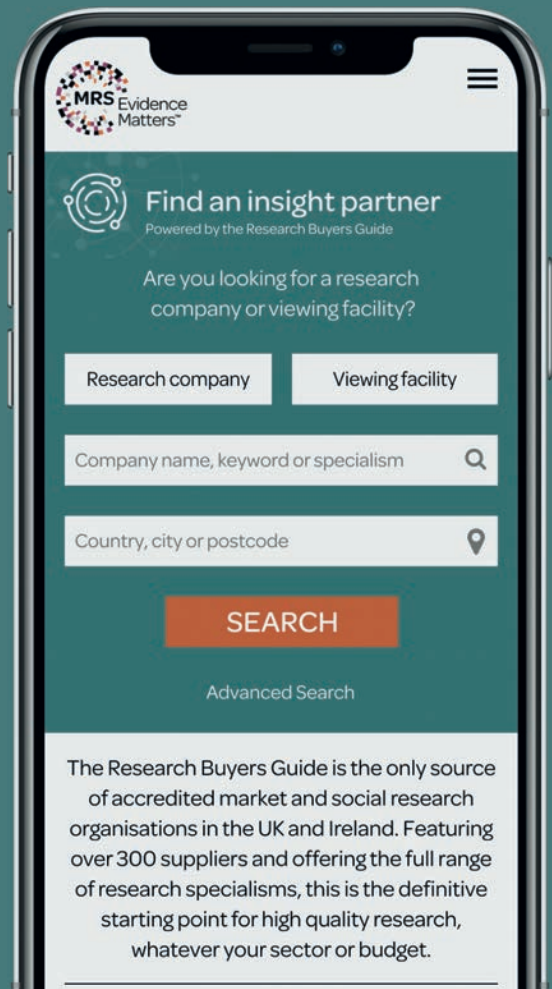

Reshaping the rulebook

The UK listings review was launched in November last year 'to strengthen the UK's position as a leading global financial centre'. After consultation, companies, investors and markets eagerly await recommendations in 2021.

With Brexit and the pandemic, it will be critical that we seize the opportunity to reshape our rulebook so that our listings market is conducive to the needs of fast-growing new-economy companies, particularly tech companies, which will create the growth and jobs of the future.

Britain must be as much at the forefront of the fourth industrial revolution as it was of the first, while cementing London's reputation as a world-class market with high standards of governance, shareholder rights and transparency.

Key areas seen to be making the UK less competitive include free float requirements and dual class share structures (DCSS). A minimum free float requirement of 25% versus 10% in the US leads founders to view a UK listing as requiring the loss of more long-term value. The unwillingness of UK shareholders to accept DCSS has been cited as a major obstacle to attracting fast-growth businesses.

"Britain must be as much at the forefront of the fourth industrial revolution as it was of the first"

Many founders want to retain control of their businesses while they continue to develop them post-listing, but do not want the perceived lower valuation and liquidity issues of missing out on a premium listing. A founder can be more motivated by the creation of long-term value in the face of short-term opportunities, such as a proposed acquisition early in life by a foreign company, which could lead to the impoverishment of the UK's listed ecosystem, tech ecosystem, and HMRC. Not all DCSS are alike, and a balanced conversation about types and limits would be welcome.

Many UK founders would like a home listing, to be famous here and give back, but feel pulled to the US by the friendlier environment – where tech founders are feted in Wall Street, Main Street and the media – and higher valuations.

Indeed, valuation is the overarching challenge. For most founders and shareholders contemplating an initial public offering (IPO), the major goal is the highest price, to reward and facilitate the further development of the companies they have built. Until we have a critical mass of businesses with comparable attractive valuations, we need regulations that actively draw them here.

We need an ecosystem and, potentially, new FTSE sectors to attract entrepreneurs, bankers, analysts and investors. The media sector was created after the recession in the early 1990s by merging agencies with broadcasting and publishing, respectively plucked out of the leisure and paper, packaging and printing sectors.

The dozen FTSE media players this spawned by 2000, the peak of the dotcom boom, included Sky and WPP. Both mid-90s FTSE constituents had been but glimmers in the eye of visionary founders in the mid- to late-1980s. Indeed, Sky, 39% founder controlled, was bought by Comcast in 2018 for $39bn, the highest ever exit valuation for a UK media company. Its spectacular success must surely, largely, be because of the influence of the founder and his substantial skin in the game.

This debate is framed as high regulation versus cutting regulation to win IPOs, but it is really about striking the right balance. There will be buy-side challenge to the dilution of shareholder controls that must be recognised and reflected in any proposed changes to the listing rules, but anything that deters companies will be a pyrrhic victory.

Public markets must embrace founder-led businesses with flexibility and celebrate our fastest growth companies, which represent jobs and the future of an independent Britain. Nasdaq must not remain the natural destination for aspirational companies, and we must stave off the emergence of any European exchanges as greater competition over time.

The current exciting pipeline of IPOs could go to the US, trade sale or private equity if we miss this opportunity. London has a natural time and language advantage – we must now create a regulatory advantage to capitalise on the pipeline and attract these companies before it is too late. *Carpe diem*!

Public interest technology is a growing field focused on the ethics of how we build, apply and interact with systems.
By Katie McQuater

Civic-minded

In 2020, Netflix documentary-drama *The Social Dilemma* brought a disturbing vision to our screens: shady controllers monitored people's every online move, influencing the content they come across and, thereby, their mood, and even their likelihood of being indoctrinated.

If it sounds like a dystopian prospect of a distant future, it's far from it. Facial-recognition technologies; the hyper-targeted digital advertising market; the growth of disinformation and conspiracy theories threatening democracy, leading to violence such as the attack on the US Capitol; online abuse of female journalists and politicians. All are negative outcomes of technology.

There is a growing field that recognises technology should be designed, understood and applied in a way that considers all outcomes and potential impact. Enter public interest technologists – those who operate in and around tech, who understand that designers and coders don't function in a silo and that tech should be used to benefit society as a whole.

"Public interest technologists produce knowledge, hardware and software optimised to advance the public good. Therefore, they are less likely to mine and trade in personal data," says Mutale Nkonde, founding chief executive of non-profit communications agency AI for the People.

"They provide resistance against technologies with sexist and racist inputs, and they look for new ways to design, deploy and govern advanced technological products through justice-affirming frameworks."

Public interest technology has emerged from a need to reshape how technology works – and to hold accountable those who hold the power. Definitions of the field can vary, however.

Sarah Drinkwater, director of responsible technology at Omidyar Network, and former head of Google's physical start-up hub, Campus London, points to a lack of shared language.

"A core challenge for those of us working to build a more equitable technology ecosystem is the lack of common language to rally around," says Drinkwater. "Technologists, academics, activists and us, as the public, all use different words to mean the same things. When I hear the term 'public interest technology', my first question is: who is that

public? There's such clarity around what we don't want – systems that entrench inequalities – but we need to get clearer on what we do, to help us all accelerate; whether it's responsible technology, humane or ethical technology, or public interest."

Algorithmic bias

Conversations about the problematic impact of technology often refer to algorithmic systems and their increasing prevalence in our public and private lives. Algorithms are not built in a bubble, and their potential negative consequences, either intended or unintended, are far-ranging – from pressurising us to purchase, to infringing on our fundamental right to privacy, such as police forces' use of facial recognition for public surveillance.

Algorithmic bias also means that the effect is intersectional: race, disability, class and gender all have an impact on how decisions are made about our lives, without us necessarily being conscious of it.

Nkonde was part of a team that helped introduce the Algorithmic Accountability Act into the US House of Representatives in 2019. The bill calls for large tech companies to audit the algorithmic systems they build, to ensure they do not violate the civil rights of people from protected classes.

To address algorithmic bias, Nkonde says the US government should mandate independent impact assessments that would make clear how people from protected classes are affected. She likens this to the US Food Drugs Administration, which makes sure food and drugs are safe.

Public interest technology goes beyond discussions of regulation, which often becomes a back-and-forth game between big tech and government authorities. So, are discussions about technology's wider impact too dominated by the issue? No, says Nkonde. "We need discussions about regulation, because there is none, but we also have to discuss how to ensure communities understand how algorithmic decision-making systems work to build agency among the most impacted groups. Companies themselves should also take their corporate responsibility obligations seriously."

Carl Miller, research director at the Centre for the Analysis of Social Media at think-tank Demos, says regulation is just one part of the picture. "We often try to deal with online problems simply by regulating the tech giants, rather than trying to find other ways of dealing with the problem," he adds.

"Decisions being made around platforms, or where data goes – they're up for grabs, disputed"

Technology 'up for grabs'

It's important that there exists the prospect of an alternative to the systems we've become accustomed to, says Miller. "Within my own field of social media research and online analytics, the reason it's so important to have a civic society that can do this is to, basically, keep an independent voice that can hold the tech giants accountable.

"Technology is political in many ways; it's kind of what power flows through, and it shapes our lives – and you don't have to look far to find this radical alternative to the settled order. In Taiwan, digital democrats have made entirely new ways of connecting people with politics that are very open-source and radically transparent."

He adds: "The decisions being made around platforms, or where data goes, or what our experiences are using these platforms – they're up for grabs, they're disputed, and they don't have to be the way that they are."

Public interest technology can take the form of platforms that operate differently from the established tech players – a search engine that plants trees, for example. But commercial sustainability can be an issue, notes Miller.

"The problem is, because they're not run for profit – and they're certainly not run using this enormous capitalist architecture that has proven itself to be so successful – very, very few, if any, have managed to scale up and make genuine competitors," he says.

Funding is an ongoing challenge for public interest technologists, says Nkonde. "Funding is dependent on philanthropic funds, and that carries a certain amount of risk. Therefore, organisations like mine have to find a way to capitalise on their work to make it sustainable."

Drinkwater also points to the power imbalance. "Whether you're an 'ethical owner' embedded in big tech, or a start-up designed in opposition to Silicon Valley norms, the core challenge is the imbalance of power between several large companies and everybody else."

The Omidyar Network has developed a toolkit for technologists to help them understand complex topics, including AI bias and surveillance. "We see incredible appetite from workers to do the right thing, but employers are constrained by their business practices," says Drinkwater. "So, for those working in the field – and the field is so broad, from engineers building in co-ops to researchers and beyond – they're pushing against the grain, exactly as previous generations of earlier tech workers did in building Silicon Valley."

Lie detector

Misinformation has increased during the pandemic, and social network analysis suggests that, in the case of Covid-19 conspiracies, ordinary people – rather than bots – are the key drivers. By Wasim Ahmed

Over the past few months, there have been a host of Covid-19 conspiracy theories shared across social media. In some quarters, this has been described as a "tsunami" of misinformation.

In the early phase of the pandemic, wild theories suggested that American business magnate Bill Gates had intentionally caused Covid-19 to implant digital microchips that could track and control people. There have also been conspiracies around vaccines altering human DNA.

Other theories have claimed that technology, such as 5G, is the cause of the virus, while others have argued that the entire pandemic is a hoax and encouraged social media users to film their local hospitals to prove they are empty. Our research focused on the 5G and #FilmYourHospital conspiracy theories, and we published two papers in the *Journal of Medical Internet Research* in 2020.

It has become really important to have access to tools and methods to rapidly analyse social media data to detect drivers of misinformation. This is because false and misleading information is a serious public health concern. If certain people believe that the Covid-19 pandemic is a hoax, they may ignore lockdown restrictions and/or be sceptical about vaccines.

There is research to support the view that those who might believe in conspiracies may be less likely to follow government recommendations. This could have negative health outcomes, making it important to study the types of misinformation circulating on social media and the drivers of that misinformation.

In the case of the "5G and Covid-19" conspiracy, 5G phone masts were vandalised across the UK, as well as in Europe. For the #FilmYourHospital conspiracy, people attempted to enter hospitals to film inside them.

Using the Microsoft Excel plug-in NodeXL, we were able to retrieve tweets related to a time when there was heightened interest in the two conspiracies. NodeXL provides quick access to data from a number of different social media platforms.

In our first study, data relating to the hashtag #FilmYourHospital was retrieved from Twitter for a seven-day period between 13 and 20 April 2020. In total, 22,785 tweets were captured, sent by 11,333 Twitter users.

For our second study on Covid-19 and the 5G conspiracy theory, we retrieved data from between 27 March and 4 April. In total, 10,140 tweets were retrieved, sent by 6,556 Twitter users.

Social network analysis was used, drawing upon the Clauset-Newman-Moore algorithm. This allowed us to analyse and identify network structures within the Twitter conversation taking place.

For the 5G conspiracy theory, we found that the two largest structures were an 'isolates' group and a 'broadcast' group. For the #FilmYourHospital conspiracy, the largest clusters identified were broadcast networks.

An isolates group occurs when a large number of users tweet about a topic without mentioning other users or retweeting tweets. These users tend to be outsiders from the core discussion.

A broadcast network structure occurs when a single user, and/or a group of users, is being retweeted in high frequency.

Our research revealed that influential users were distributed across the network, forming their own groups and audiences. We also found that ordinary citizens were among the key drivers of the conspiracies, and users would link to fake news websites and/or videos on YouTube that contained misinformation in order to make their point.

Certain Twitter accounts engaging on the 5G conspiracy theory network may have had ulterior motives, because they could seek to profit from it – including websites claiming to sell products to protect against 5G.

An interesting aspect of both conspiracy networks is that tweets tend to build steadily and then peak, causing a flurry of tweets that then die down. For the '#FilmYourHospital' conspiracy, our research also checked to see whether users were likely to be bots – an automated account that can be controlled by a third party.

We used the Botometer tool to detect bots within the network and found that only a small number of accounts displayed bot behaviour – indicating that, potentially, the network was comprised of ordinary citizens.

Our recommendations were that public health authorities could make use of quick, targeted interventions to reduce the impact of misinformation. Moreover, we suggested that users could use the report feature of a social media platform to flag content that may go against the terms and conditions of Twitter. We also recommended enlisting the assistance of influential users, celebrities, and popular-culture figures to help share factual information, because official government accounts may be viewed with scepticism.

Wasim Ahmed is a lecturer in digital business at Newcastle University Business School

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Driving in automatic

Can an artificial intelligence system automate text analysis without losing accuracy? Jaguar Land Rover has integrated AI into its brand tracking with the aim of doing just that. By Liam Kay

Humans are experts at deciphering language and picking up the nuances in speech, and the meaning behind words. In the ever demanding world of brand tracking, can rigour and analysis be retained in research while increasing speed and reducing cost?

A partnership between research agency MM Eye and Jaguar Land Rover aimed to explore whether an artificial intelligence (AI) system could help uncover customer sentiment in answers to open-ended questions and save the brand time and money.

The project started in 2017 and was intended to help Jaguar's brand health survey, examining customer views and feelings towards the company. Specifically, its goal was to explore whether long-form, verbatim responses to questions posed by the survey could be analysed by AI instead of human coders without losing the necessary level of detail and quality.

MM Eye has worked with Jaguar since 2010, and was involved with its brand health survey before the AI project. The survey has typically used stream-of-consciousness interviewing techniques to analyse consumers' emotional engagement with the brand. The questions are open-ended, so are more likely to elicit a better understanding of people's emotional connection with particular car brands. "It's like taking a look inside the consumer's head and getting a much clearer picture of how they see the world," explains Claire Catmull, head of continuous research at MM Eye. "This approach is simple to conduct, but rich in outcome."

The brand health survey works by turning answers to the survey questions into data, using a forensic coding system that identifies and categorises words, descriptive attributes, and recounted experiences with the brand. A single paragraph can provide numerous pieces of data, which are then also analysed for their emotional sentiment – whether they are said in a negative, positive or neutral way. This generates thousands of pieces of data, and the previous approach of using human coders to analyse the information collected took, on average, 53 weeks.

In 2017, MM Eye proposed changing the

methodology behind the survey. It decided that an AI "cyborg" which would automate much of the analysis, with support from human coders "could help reduce the time and cost involved in the coding process, and it began scouting the market for an off-the-shelf tool.

However, MM Eye concluded that existing text-analytic packages were unable to deliver the model the companies wanted, so it began looking at how to make its own bespoke system.

The system had to have the necessary "granularity" to allocate codes to a clause or subsentence in consumers' responses, according to Catmull – this would make the coding as accurate as possible, and similar to how a human would be able to analyse speech. It needed to be able to identify the correct sentiment used during a conversation and work with non-English languages.

"Our journey wasn't a straightforward one – more a voyage of discovery that, when we embarked upon it, we didn't know would be successful," Catmull says. "We needed the end product to seamlessly transition so as not to disrupt years of data tracking; we needed the AI to match the granularity of our existing code frame, and we needed the AI to code the sentiment."

Several approaches were considered, with the most promising being "StarSpace", a general-purpose, neural model for efficient learning of entity embedding, used by Facebook to identify people's interests and outlook. In January 2019, MM Eye reworked StarSpace to operate within the subsentences often analysed in the brand health survey. This, says Catmull, turned out to be a "breakthrough".

"Tapping into expert advice gave us a significant step forward and the route into using the StarSpace approach to allocations. Another significant step came when we appreciated that some element of "human" verification would still be required if we wanted to meet our goals."

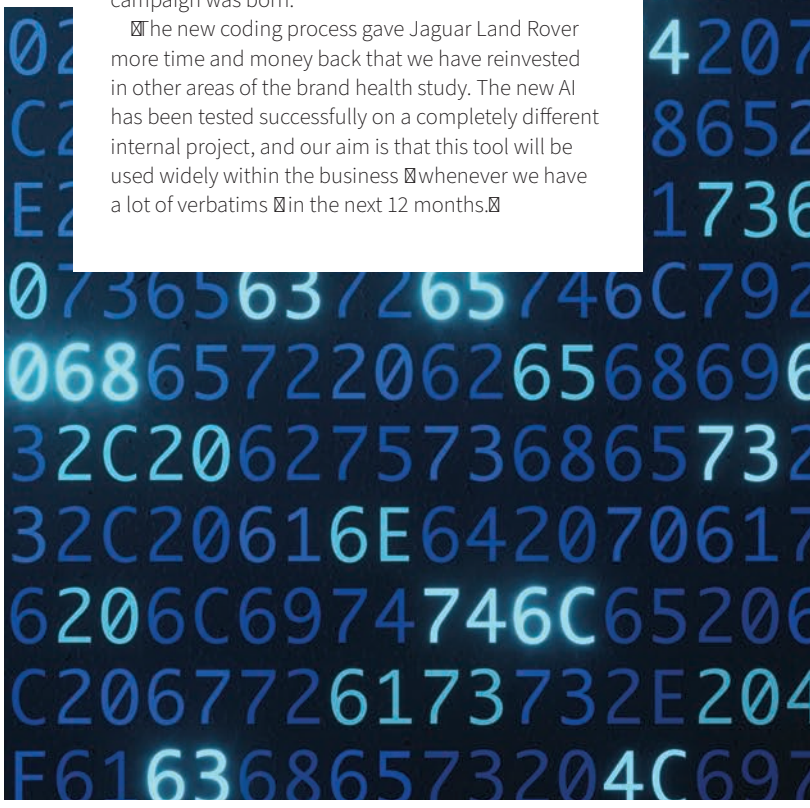
The new coding system is self-learning, so it can improve its analysis continuously, based on previous data. This is coupled with human oversight, so accuracy is maintained at pre-AI levels. Accuracy of the initial AI analysis of sentiment and meaning is at 70%, up from an initial 50% and with aims to increase this to 80%.

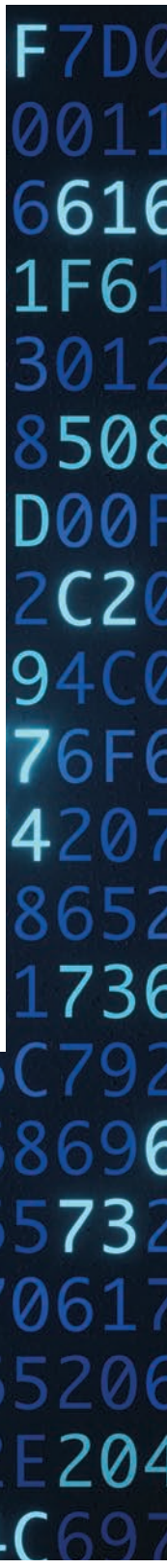
In the first year of using the AI system, there was a 33% reduction in coding costs, which the companies expect will drop further, and there has been a significant fall in the amount of time needed to complete the coding process.

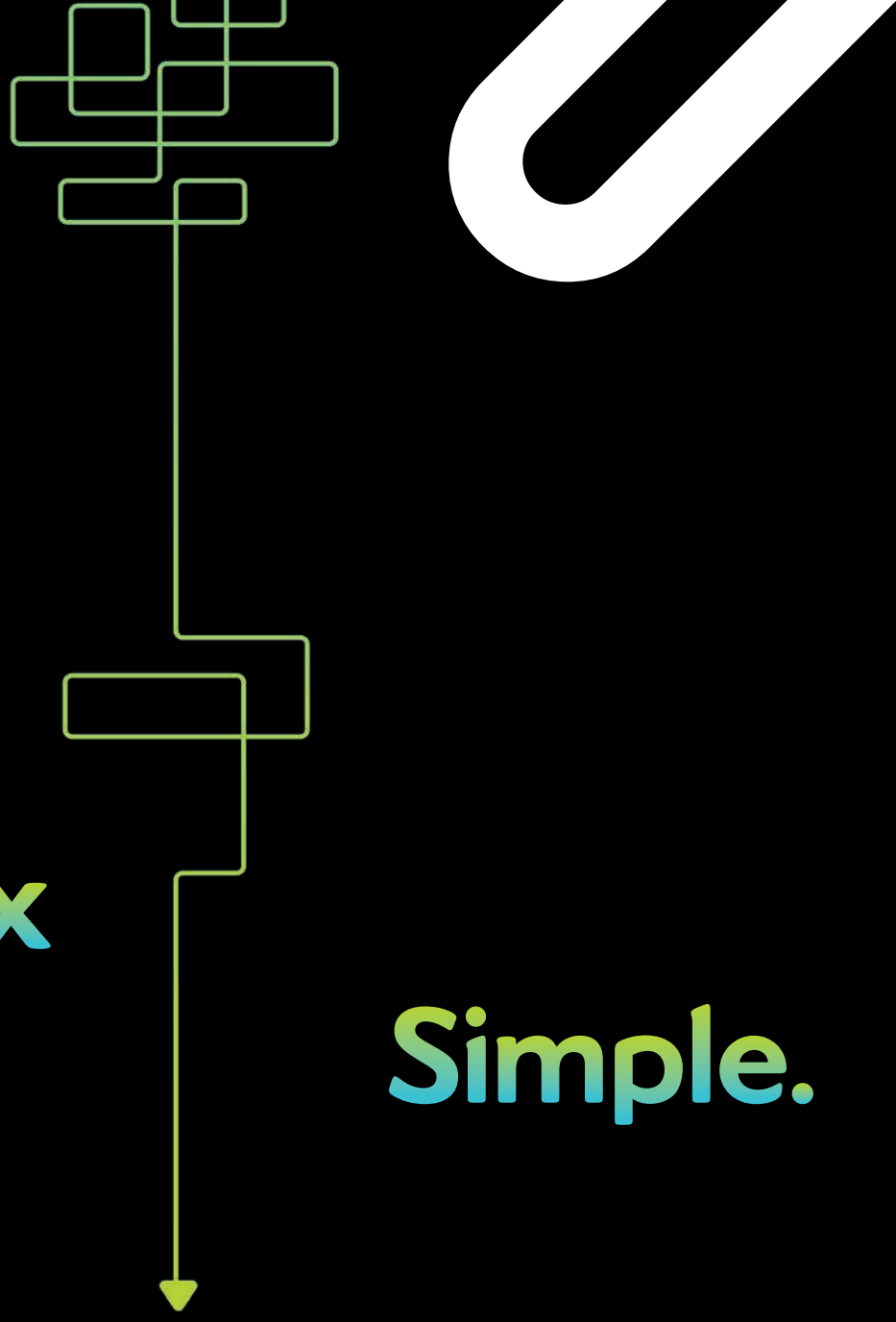
Jaguar Land Rover has used the cost savings to expand the AI tool and are exploring how it could be used elsewhere in the business. For example, the recent Jaguar "Bend the Rules" campaign was supported by the AI system.

Iulia Calin, brand and communication lead, global customer insights at Jaguar Land Rover, says: "The new coding system has helped us to have data much quicker, which meant we could have early discussions with the UK marketing team, for example, and our creative agency – and like this the "Bend the Rules" campaign was born.

"The new coding process gave Jaguar Land Rover more time and money back that we have reinvested in other areas of the brand health study. The new AI has been tested successfully on a completely different internal project, and our aim is that this tool will be used widely within the business – whenever we have a lot of verbatims – in the next 12 months."







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Protecting privileged information

I recently presented on the impact of Covid-19 on macro consumer spending habits in UK supermarkets and the forecast for the coming year. I have made an annual market presentation for several years, but this survey statement really grabbed my attention: 'My number one concern is to get food onto the table.'

This response came from a large number of households that have been newly impacted by the virus. These are people who may have been furloughed, or are experiencing a change in their economic situation, affecting the way they live.

As ever with data, a comparative observation really brought this to life; among households that feel insulated from the financial impact of Covid-19, their number one concern is 'to be able to meet friends and family again'.

This is really personal information. The analysis served as a reminder to me of how privileged we, as data analysts, are to be able to get everyday access into the lives of the consumer. Even better than that, we get to build analytics based on that data, and build a layer into our story that brings the human element to life for the audience. For a household (this survey came from a shopping panel) to give that honest perspective of their personal situation is really powerful and should not be taken for granted.

Data such as this is shared when the individual has the confidence that what they are sharing is being used in the right way, and as they expect. Whether it be 'passively' collected or declared behaviour, trust in the usage of data is vital, and we have a duty as an industry to protect this valuable asset and to respect the way consumers give us permission to access their lives. A few front-page headlines on misuse of personal data could set our industry back at a time when the potential for bigger and better customer analytics is growing and needed.

The advances in mobile phone technology and our online footprint provide the possibility of greater insight into personal behaviour that go beyond 'surveyed' responses. Given the number of data moments being created, and the ability to store information growing and becoming more affordable, we are theoretically able to make connections of behaviour at increasingly granular levels, and across multiple parts of someone's life.

It is the connectivity of the data that offers the richest datasets possible, but it is where we have to proceed with care and caution. To make this level of connection requires the individual to give that permission and, as data users, we have to respect that permission as the basis of our available datasets.

With so many behavioural observations on individuals at our disposal, will we need access to survey and attitudinal information in future? There is a debate about the use of survey data and the efficacy of data because of the time to rationalise responses – but, for me, the strength of analytics has always been to develop and use new and old approaches to create a rounded picture of behaviour. After all, people are varied in nature and, most of the time, we are not robots. A combination of behavioural observation and claimed analytics can ensure that we bring a factual base and, when it is required, build an emotional element of consumer behaviour into our work.

"Trust in the usage of data is vital and we have a duty as an industry to protect this valuable asset "

As an industry, we may find ways to reward the individual to give access, but we have to keep the consumer on our side if we want to continue to use this asset.

The first question I ask when looking to work with people-based data is: do we have the permission to work with data in the way the person expected? There is a strong privacy framework in place through law and we must strive to operate within the boundaries of the permissions, but most importantly ensure that we favour the individual perspective over short-term commercial advancement.

I believe that we are accelerating to a world where people see their data as ever more valuable and may start to commercialise their own behavioural footprint. The legislation on open banking information access puts more knowledge in the hands of the individual if they want it.

That theme will evolve, but – whatever happens – we need to act with integrity, and respect the asset to ensure that, when we need it, we can choose to make the connection between behaviour and emotions to bring to life the reality of the households around us in the most compelling way.

The pursuit of happiness

How do you quantify what makes someone happy? A recent paper suggests that the process of learning is more rewarding than a reward itself. Liam Kay **reports**

Can money make you happy? For some, the answer is an obvious no, while others, perhaps, put more emphasis on material rewards.

The research team behind a recent smartphone app, The Happiness Project, set out to explore the circumstances in which humans are happy or unhappy. Bastien Blain, research associate at University College London's Queen Square Institute of Neurology, who worked on the project, says that the recent focus has been on the impact of learning and reward on happiness.

An initial lab experiment carried out by Blain and his colleagues saw volunteers play a game in which they decided which of two cars would win in a race. In the 'stable' condition, one of the cars always had an 80% chance of winning. In the so-called 'volatile' condition, one car had an 80% chance of winning for the first 20 trials, switching to the other car for the next 20. The volunteers were not told these probabilities before the experiment began, but had to work them out by playing the game.

Before the race started, the participants were shown the potential reward they would receive for their car winning. The size of the reward fluctuated at random between trials and was unrelated to the chances of a car actually finishing the race victorious.

In between trials, volunteers were asked to rate their current level of happiness. The results showed that participants, particularly those who exhibited symptoms of depression, were happier in the stable condition and after they had won.

The key finding, though, was that the size of the reward had no bearing on happiness – instead, it was how surprised the person was to claim victory. The idea was that 'learning' and trying to work out when a reward would appear was more fulfilling for an individual than the reward in and of itself. Participants were happier when they were able to

learn which car was better even when the reward size was low.

Following the experiment, the researchers created an app to study further the effects of learning on an individual happiness. We do some things because we get an outcome such as a salary, Blain explains. Sometimes, we do things because we are interested in the activity and they are rewarding in their own right. There are no obvious payments or outcomes, and yet we do it. We wanted to unpack that.

The app allows users to play games that test their decision making and learn about the science of happiness, while also providing behavioural data for the research team to help examine the nature of happiness and its relationship with the learning process.

It was designed to test the ideas about reward and learning outside of lab conditions and in the general population, Blain says. The Happiness Project app is available through the Google and Apple app stores, and Blain says the team is hoping between 30,000 and 40,000 people will play the games. Questionnaires are included to understand more about the mental health of its users.

By examining the relationship between learning and happiness, Blain hopes to uncover some of the factors behind psychological conditions or depression.

He argues that the results also tell us something about what motivates human beings. If people are motivated only by extrinsic rewards such as your wage or because you get something tangible you are more likely to be depressed than if you do something because you enjoy it, he explains.

If we have a game, we have access to the mechanisms behind depression. We know the neural phases of decision making, we have an idea of the computational mechanisms behind decision making and, by having games, we can quantify very precisely individual differences.

The next step for research in this area, according to Blain, could be to examine the balance needed between reward and learning. For example, would learning without a reward generate similar levels of happiness to learning with one? And how great or small does a reward have to be in relation to the amount of learning involved?

We predict that if learning competes with reward, people would prefer having learning involved, Blain says. If you have a choice between doing something really boring or difficult and you could get some money, or something that is challenging but not too difficult or boring, but you don get a bonus, my prediction is they would prefer something challenging.

If you get people doing things where they do not learn, a bonus will be required. They will not have intrinsic motivation. However, if there is a notion of learning or challenge, then people will tend to do that more and without a bonus. They will enjoy it and be happier.

Momentary subjective well being depends on learning and not reward, Bastien Blain, Robb B Rutledge, *eLife* 2020, 9:pp 27

Itís not easy being green

In 2021, sustainable behavioural change is no longer a lifestyle choice, it is a necessity. We need to find ways to accelerate sustainable behaviour before it's too late. Behavioural science helps us understand why a sustainable lifestyle is currently not easy to achieve, yet it also tells us how to make it easier for consumers.

Climate change scientists calculate that we need to reduce our individual carbon footprints by 75%, to less than two tonnes per person per year, to have any hope of avoiding a catastrophic rise in global temperatures of two degrees. The average Briton emitted more than eight tonnes in 2017 and the global average is around four tonnes.

Clearly, companies need to take action to reduce their footprints, but changing individual behaviours is equally critical; 40% of UK emissions are estimated to come from households, and basic necessities such as heating, food and daily travel are the main contributors.

So how can we make the dramatic inroads urgently needed to reduce our carbon footprint by 75%?

1. Make impacts and gains much easier to understand

'Cognitive strain' – having to think too hard or navigate complexity – can lead to lack of engagement and action. Cognitive strain is often high for those wanting to lead a sustainable lifestyle, as it's so complex to understand. 'Tonnes of carbon' is a very abstract term; with few common reference points it is hard to visualise, which makes taking informed decisions difficult.

Seth Wynes, at the University of British Columbia, calls this low 'carbon numeracy'. Several surveys that he and his colleagues have run show that, when asked to rank the impact of different actions on their carbon footprint, people seem confused about which behaviours they need to reduce or stop, and which are important to start or increase.

In general, people:

- Forget that flying has one of the highest carbon footprints, yet they are disproportionately aware that they need to stop using plastic bags
- Underestimate the carbon footprint of eating red meat

- Hugely overestimate the impact recycling can have
- Are unaware of how large a positive impact can be achieved by using low-carbon renewable energy in their homes. A 2020 poll found that 47% of people did not consider their gas boilers as contributing to global warming – even though they account for 17% of carbon emissions.

Overall, people lack joined-up thinking on sustainability and lowering their carbon footprint, partly because of the plethora of lists and tips in the media on how to live more sustainably.

Low-carbon numeracy is, in part, down to availability bias – where people give more weight to things that spring to mind easily, often caused by campaigns focused on simple changes such as reusable coffee cups or bags for life.

Households lack guidance to help them understand what steps will have the greatest impact and how they can practically cut their carbon footprint by 75%. Bill Gates recently said, in an interview with *Wired*: "It's a field with a lot of positive energy, but without a plan."

Without any plan, people don't realise the importance of retrofitting their housing (insulation, solar panels and heat pumps) and buying energy-efficient appliances (for example, A+ rated) that can make a substantial impact in reducing a household's carbon footprint. Even though households will gain money back in the future because of lower running costs, the pain of the initial financial outlay weighs heavier, and means we disregard future gains – a concept known as present bias.

Behavioural science practitioners have explored how to increase energy-efficient, A+ rated purchases by aiding carbon numeracy. In 2018, the Australian government's Behavioural Economics Team trialled simple, salient energy labels at an online appliances store, and found they led to an increase in purchases of more energy-efficient products. Consumers who saw an energy rating label were 20% more likely to purchase efficient appliances.

2. Make low-carbon choices the default

Even if people are given a clear goal to improve their carbon numeracy, and have committed to doing so, they often find it hard to change behaviour. We're frequently short of time or mental bandwidth, or procrastinate if there are choices to make.

Indeed, recent research indicates that voluntary action by individuals may be limited. A 2018 study by Milena Buchs and her colleagues at the universities of Leeds and Southampton found that, despite raising awareness by giving households personalised carbon footprint estimates, there were no measurable changes in those households' travel behaviours and home energy use, even after a year.

Defaults, or automatically opting people into certain choices, are the most effective tool in the behavioural scientist's box. A review of behaviour change interventions found that defaults increase participation or selection of a choice by 50% (Hummel and Maedche, 2019).

Defaults have been shown to reduce a household's carbon footprint, particularly for big, one-time changes – such as retrofitting homes – that will help to make significant leaps towards meeting the 75% reduction. However, these measures still need to be communicated in a way that creates momentum and a sense of progress and, ultimately, to communicate achievement of a goal.

"Households lack guidance to help them understand what steps will have the greatest impact, and how they can practically cut their carbon footprint by the required 75%"

A 2020 study in Germany found that offering renewable energy tariffs as the default led to a 20% increase in green electricity consumption (Kaiser, Bernauer, Sunstein and Reisch, August 2020).

Similarly, a Danish utility company offered free upgrades to heat pumps; 85% of households accepted the offer in the default condition, but that figure dropped to 35% if a household had to opt in itself.

Importantly, implementing a default strategy takes some of the responsibility off the consumer's shoulders, returning it to energy providers, companies and governments, just as auto-enrolment pensions in the UK have lifted some of the pressure from employees.

Let's see if we can identify opportunities in more sectors where changing the default to a low-carbon option could play a significant part in cutting our carbon footprints by the required 75%.

Implications and call to action:

- Behavioural science practitioners and consumer experts must develop a cognitively easy action plan for people to follow
- We don't need yet another list of 'tips' or another carbon calculator, but a coherent personal goal and step-by-step strategy to achieve that goal – for example, what five actions get us down to a two-tonne footprint, split into what consumers can do voluntarily and which measures would be undertaken on their behalf by government and industry initiatives, using default options and other measures
- Behavioural science and research has a central role to develop simple yet persuasive communications that frame low-carbon behaviour changes in the most powerful way, identifying easy-to-grasp reference points that can build greater meaning and motivation. This can help consumers understand exactly what their personal 75% reduction goal is and how to achieve it, while also building behavioural energy and momentum to achieve these goals.

Photography by Lucy B

Elephant in the room

Shanice Mears**, head of talent and co-founder at The Elephant Room, and founder of the agency's 'one month mentors' programme, talks about getting young black employees into advertising and how companies can become more accountable.**
By Katie McQuater

First, can you tell us about The Elephant Room?

The Elephant Room is a creative agency dedicated to creating a more inclusive space within advertising, not only through work and representation, but also through methods of building business. We want to be an example of change.

What does your role as head of talent involve?

It's my job to make sure we have a network of creative talent, both in advertising and outside of it. But also to be up to date with what is happening in culture across the world, so that we can be on the pulse and well positioned to work on the most culturally effective projects.

What's the background to the 'one month mentors' programme?

The project matches young people who want to venture into creative careers with senior and C-suite leaders, and aims to help young talent build sustainable relationships in the industry. This is centred on the calendar year – Black History Month, International Women's Month, and Pride, particularly for mentees who identify as such, and exclusive to them for that month. Ultimately, we're on a mission to support talent.

Did research have any role in the development of this?

Yes, but I feel like my role is all about research. I often speak to talent about what they want. I read articles, I listen to podcasts and think about what I would have needed if it was me in someone else's shoes, or if I wasn't in a position to do what I do now. My day-to-day understanding of the industry is my research, and then it's bouncing those ideas off my team.

"Black people within the workplace need to feel empowered, and, more often than not, they don't"

How important is mentoring for young black employees and potential employees?

Extremely important. Black people within the workplace need to feel empowered, and, more often than not, they don't. We often face stereotypes, lack of belonging, prejudice and discrimination, which doesn't always enable us to progress within, or remain with, a company. We often choose to opt out to avoid conflict, awkwardness or sadness.

Everyone deserves to be empowered in the workplace – it just happens to be that we are a minority who often feel ignored.

There's a lot of talk about inclusion. How can organisations be more accountable?

Do what you say and mean it. It's not enough to talk, or participate in agency and client debate. We have to be actively anti-racist and call out the behaviours that are unacceptable. No-one in their own skin, ability, sexual orientation, class or background should feel lesser – or worse, not accepted – in any workplace in times like now. It's just not OK.

You were asked to sit on Downing Street's Race Disparity Audit. What did that involve?

I sat on the race advisory board, which meant analysing data and programmes in the NHS, education, and around police stop and search.

It meant discussing the figures and advising on how to improve our understanding of why they are that way in the first place. I was among other leaders and community activists.

Is a lack of data contributing to systemic barriers?

You could say that, but it's a lack of education, understanding and a touch of ignorance about why we have systemic barriers. There is evidence out there that classism, racism, sexism and things such as the gender and ethnicity pay gap exist – and that is because of the leadership that has historically been in place.

Last year, you wrote a piece published in *Campaign*, in response to the ad industry's open letter in the midst of the Black Lives Matter (BLM) movement. Have you noticed any changes in the industry's policies around hiring methods, wellbeing and ethnicity pay-gap data since?

The census from the Institute of Practitioners in Advertising and the Advertising Association is a start to see a) how far we have come, and b) how far we've yet to go. Initiatives and programmes are a good way of starting things. I sit on the steering group for [diversity campaign] #10000BlackInterns – which I think is a great initiative – I encourage everyone to sign up. There's been some transparency around data, but not enough.

What should organisations do to better engage with prospective new hires?

Dedicate a team of people within the recruiting team to get into communities, do research, and meet new people. If people are proud of the company and where they work, they will want to share that sentiment with others.

Essential safeguards: whistleblowing

The MRS standards team has continued to add to the essential safeguards series of guidance, with the aim of guiding our members in the prevention of harm, a key construct of the MRS Code. The latest addition to the series covers whistleblowing.

What is whistleblowing?

Whistleblowing is the act of disclosing information about wrongdoing in the workplace. This could mean highlighting possible unlawful activities in an organisation, failures to comply with legal obligations, or miscarriages of justice, or reporting on risks to the health and safety of individuals or to the environment.

Such activities could be a violation of a law, rule or regulation, or a threat to public interest, such as fraud, health and safety violations, or corruption.

By 'blowing the whistle', individuals may highlight illegal activity in the workplace, and may protect others in future.

Whistleblowing and the law

The Public Interest Disclosure Act 1998 provides legal protection for individuals who disclose information to expose acts such as criminal acts. The equivalent legislation in Northern Ireland is the Public Interest Disclosure (Northern Ireland) Order 1998.

The legislation made substantial amendments to the Employment Rights Act 1996 – and the Employment Rights (NI) Order 1996 in Northern Ireland – to protect whistleblowers from dismissal and detrimental treatment by their employer. In some cases, workers may bring a case before an employment tribunal, which can award compensation.

As a result of the legislation, some employers have developed internal whistleblowing procedures, although the legislation does not enforce this. If you, or your employer, do not already have a whistleblowing policy in place, negotiate to create a policy that encourages workers to feel confident in raising concerns, and establish a fair investigative process.

What counts as whistleblowing?

As a whistleblower, you're protected by law – you should not be treated unfairly or lose your job because you 'blow the whistle'.

You can raise your concern at any time about an incident that happened in the past, is happening now, or you believe will happen in the near future.

You're protected by law if you report any of the following:

- A criminal offence – for example, fraud
- Someone's health and safety is in danger
- Risk or actual damage to the environment
- A miscarriage of justice
- A business is breaking the law – for example, does not have the right insurance, or is breaching Covid-19 rules on hygiene, face coverings, social distancing, and so on
- You believe someone is covering up wrongdoing.

Personal grievances (for example, bullying, harassment, discrimination) are not covered by whistleblowing law, unless a particular case is in the public interest. These cases should be reported via employers' grievance policies.

Who to tell and what to expect

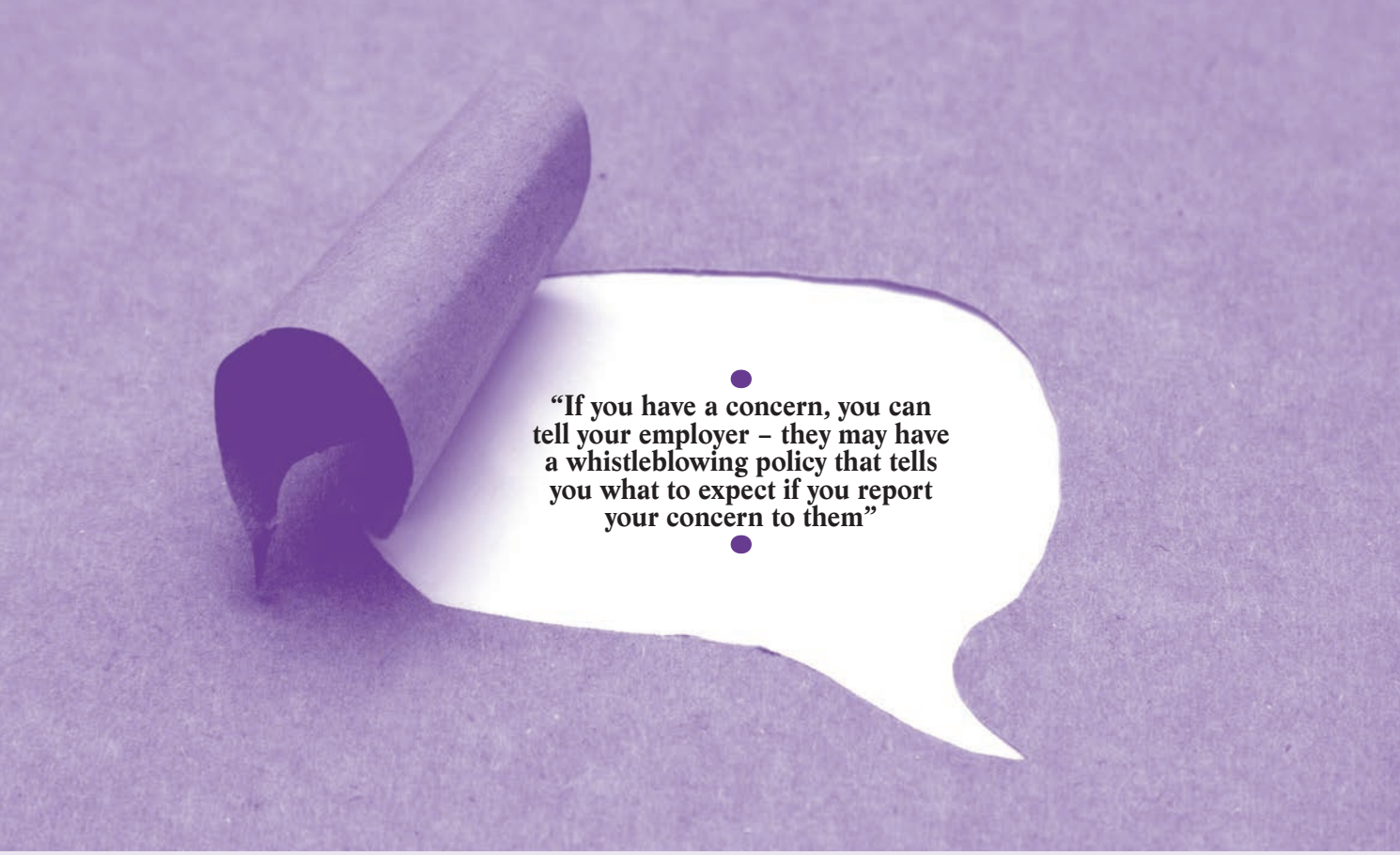
If you have a concern, you can tell your employer – they may have a whistleblowing policy that tells you what to expect if you report your concern to them. You can still report your concern to them if they do not have a policy.

There are other options if you do not want to report your concern to your employer – for example, you can get legal advice from a lawyer, or tell a prescribed person or body. On the Department for Business, Energy & Industrial Strategy (Beis) website, there is a list of the prescribed persons and bodies to whom you can make a disclosure, and a brief description about the matters you can report to each prescribed person.

If you decide to blow the whistle to a prescribed person or body, rather than to your employer, you must make sure that you've chosen the correct person or body for your issue.

Making your claim anonymously or confidentially

You can tell your employer or a prescribed person or body anonymously, but they may not be able to take the claim further if you have not provided all the information they need.



You can give your name but request confidentiality – the person or body you tell should make every effort to protect your identity.

If you report your concern to the media, in most cases you'll lose your whistleblowing rights as defined by the Public Interest Disclosure legislation.

What your employer or a prescribed person will do

- Your employer or the prescribed person or body will listen to your concerns and decide if any action is needed. You may be asked for further information
- You must say straight away if you do not want anyone else to know it was you who raised the concern
- Your employer or the prescribed person or body can keep you informed about the action they've taken, but they cannot give you much detail if they have to keep the confidence of other people
- A prescribed person or body cannot help you with your relationship with your employer.

If you're not satisfied with how your employer dealt with your concern

Tell someone else (for example, a more senior member of staff) or a prescribed person or body if you believe your concern was not taken seriously or the wrongdoing is still going on.

Alternatively, contact the Advisory, Conciliation and Arbitration Service (Acas), the whistleblowing charity Protect, or your trade union for more guidance.

Key facts

1. If you suspect unlawful activity at work, you may want to inform someone about it
2. Workers should only blow the whistle when they have sufficient hard evidence and they cannot use the usual grievance procedure
3. Workers are protected from detriment and unfair dismissal if they blow the whistle.

For disclosures to be protected by law, workers must make them to the right person, in the right way, and not for personal gain.

This information is being provided as part of the commitment by MRS to provide support and advice on safeguarding issues. Please note that the MRS guidance is provided for information; it is not legal advice and cannot be relied upon as such. MRS will not be liable for the content in this version or any decisions made, or action taken, in reliance on the information in this version. Compliance with this guidance document cannot confer immunity from legal obligations. Specific legal advice should be taken in relation to any specific legal problems or matters.

Information sources:
Acas: acas.org.uk
Citizens Advice: citizensadvice.org.uk
Protect: protect advice.org.uk/advice line
Beis: gov.uk/government/organisations/department for business energy and industrial strategy

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These have been weeks where decades happen

I am proud beyond measure of the agility, adaptability and resilience exhibited by the research sector during the difficult past 12 months: from the core skills of the field forces deployed to deliver the Covid-19 trackers to the application of digital technology in ethnography.

MRS was proud to support you, making a difference through our lobbying, communications and guidance. Every government working directive and all the changes to lockdown regulations have been assessed, discussed and the relevant guidance provided. We have won the respect of civil servants and legislators. A huge 'thank you' to those of you who have supported us in doing so much with so few resources. Your messages of appreciation have really sustained us through difficult consultations and the mountains upon mountains of advice we have provided on **mrs.org.uk** and via Codeline.

We have all pulled together, and we need to continue to do so as the reverberations from the pandemic continue to be felt socially and economically for many months to come.

In the midst of momentous change and disruption, this sector – and, by sector, I mean suppliers and clients – needs to continue to prove its relevance and build on the advances made in the past year. The demand has increased for advice at the C-suite and in policy on the attitudes and behaviours of the public. We need to stand up for ourselves – especially in the face of some gratuitous criticism – and shout about how good we are, and the importance of what we do. I am looking forward to some really imaginative entries for the MRS Awards this year that will help prove this case.

MRS was first convened 75 years ago, in a restaurant in Soho (called 'Chez Auguste', for those who, like me, enjoy such long-lost details). An original membership of just 23 founders represented, in 1946, the entire UK market and social research sector, with former prime minister Harold Wilson becoming president of the society in the late 1970s.

Who'd have thought, so many years later, we'd be welcoming such luminaries as those in our 75th anniversary cadre of honorary fellows (see right)?

Just a glance at this year's annual conference line-up – delivered under such extreme circumstances – is evidence of the extraordinary evolution of our sector. If you missed Sir Keir Starmer, Dr Camilla Pang, Sir David Speigelhalter or Andréa Mallard, the entire conference is available on demand at **mrs.org.uk/impact2021**

Our memories of the development of the sector may be fading – which is why the archive charity AMSR, and its work in capturing the change of the past decades, is so important to current and future social historians. The work this sector has undertaken in the past year will shape the way our future is remembered.

Sector and MRS news

International affiliates

Household brands, including Unilever and Mintel, are among the first organisations to sign up to the MRS international affiliate programme. Since its launch last year, the mark has attracted research agencies from countries such as Egypt, Belgium, Sudan and the US.

Main board elections

The 2021 MRS main board elections resulted in the re-election of Zoë Ruffels CMRS, of GSK, and the election of Cecilia Patterson CMRS, of MTC Marketing Research Solutions. Main Board member Sinead Jefferies takes up the role of chair designate, a position she will hold in addition to her existing board responsibilities.

Honorary fellows

MRS is awarding 25 honorary fellowships in 2021, to mark its 75th anniversary as the UK's professional body for research. The first names include Sir David Spiegelhalter and Dr Camilla Pang.

Making the most of your membership

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

Digital Impact

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The Flex Forum

Discover a range of support on flexible working

The Flex Forum has been launched to provide you with the latest thinking and practice in the research sector. With the conversation about ways of working having fast-forwarded at least five years during the pandemic, the forum was established to give research professionals a place to discuss and shape the future of flexible working. Find a wide range of webinars, blogs and articles on the website, under resources, about setting work boundaries while working at home, the future office, and blended working benefits.

Business Bookshop

Access a wide range of books for a discount

Benefit from the member-exclusive 20% off a wide range of business and professional development books by independent publisher Kogan Page. Increase your customer insight with Christine Bailey's *Customer Insight Strategies* and flex your marketing know-how with Simon Kingsnorth's *Digital Marketing Strategy*. A number of our trainers are also Kogan Page authors, including Rachel Lawes (*Using Semiotics in Marketing*) and Betty Adamou (*Games and Gamification in Market Research*).

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 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

Online courses

Virtual training: all courses are live and interactive

Survey Sampling
Gain confidence in sampling best-practice methods and how this can impact on the statistical validity of survey findings.
19 April

Introduction to Qualitative Research
Understand the role of qualitative research in contemporary insight and its general application, including the processes, planning and methods.
20 April

Data Privacy in Research
Understand the full range of data-protection principles and concepts that researchers need for compliant insight.
22 April

Digital Ethnography
Discover the key elements of choosing and implementing digital ethnography as a methodology to ensure optimum insight.
23 and 30 April (2 x half days)

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

Review and Refresh Your Survey
Practical guidance on how to conduct a robust review of your quantitative survey, with tips on refreshing it in light of today's challenges.
26 April

Moderating Masterclass
Extend your range of techniques for moderating focus groups, including NLP methodology to energise groups and meet client-observation requirements.
27 and 28 April (2 x half days)

Introduction to Statistics
Get to grips with the basic methods of statistics and sampling, and how they can be used to inform and refine approaches to market research.
5 May

Essentials of Quantitative Research
This three-day course builds a full understanding of the quantitative research process, including data collection and analysis through to presentation and conclusions.
6, 13 and 20 May

Online Panels and Communities
Understand how to best build, develop and maintain online panels or communities using the latest techniques, including software options.
11 May

Introduction to Behavioural Economics
Through collaborative learning and team exercises, this course offers a scientifically robust model for understanding the basis of behaviour change.
14 May

Creating a Culture of Insightment
Learn how to create a collective and individual culture that is ready to identify and transmit actionable insights.
21 May

Influence and Impact
Evaluate your personal impact on those with whom you interact day to day, and learn to develop rapport through non-verbal communication techniques.
26 May

7

Professor Sir Michael Marmot **is professor of epidemiology at University College London (UCL), director of the UCL Institute of Health Equity, and past president of the World Medical Association. He has led research groups on health inequalities for more than 40 years**

1 You have noted that housing is a food issue because, if you can't afford rent, how can you eat healthily? Is research too siloed to make connections between issues such as healthy eating and housing, or wellbeing and the environment?
Commonly, I am asked what one thing I would recommend to reduce health inequalities. A key reason for my refusing to answer that question is precisely because of the interconnections. Income is a housing question. Housing is a food question. Food insecurity is part of poverty.

We do need specific policies, but we need to look at them in the context of the conditions in which people are born, grow, live, work and age.

2 Data is in the spotlight like never before – has Covid-19 helped or hindered our relationship with evidence?
The pandemic has shown how reliant we are on good-quality data and, in the UK at least, how blessed we are to have such high-quality data systems.

In matters of public policy, scientists produce evidence and politicians decide how to act on that evidence. As you might expect, there is a spectrum. Some politicians are more receptive to evidence-based arguments than others.

The Covid-19 pandemic has shifted the balance quite markedly. The evidence has become front-page news. It is still the case that the evidence doesn't make the policy decisions, but it is having a bigger impact. The Office for National Statistics has shown how vital it is to have an excellent statistical office.

3 *The Marmot Review: 10 years on* was published just before the pandemic took hold in the UK, and Covid-19 has laid bare the existing inequalities in society. What impact will the pandemic have on how inequality is understood and addressed in future?
Because of the pandemic, in December 2020 we published *Build back fairer: the Covid-19 Marmot Review*, only 10 months, not 10 years, after the '10 years on' report was published. We showed that pre-existing health inequalities had been amplified by the pandemic and made worse by the societal response. Hence, our call to 'build back fairer'.

4 Where do you see the greatest need for further research/data collection? Is more international cooperation needed?
We have laid out an agenda for action on social determinants of health and health equity. In each of the key domains, we need firmer evidence of causal connections. We also need to track on health equity of societal changes.

We always have much to learn from how different contexts shape social determinants of health and assessing the effects of actions that have impact on health equity.

5 Is public health policy too focused on individual factors rather than social determinants?
I think we are making real progress in getting organisations to recognise the importance of social determinants of health.

6 What can researchers do to reduce the chance of work being misinterpreted or misused in a time of misinformation?
A good feature of what has happened under the pandemic is a great deal of high-quality public discussion about research findings. There will always be people who misuse information and evidence. That should not stop people of good faith discussing disagreements and differing views of the evidence in public.

7 What is the biggest challenge facing researchers working in health over the next 12 months?
The brilliant success of dedicated work on developing vaccines shows what well-funded science can do. As we emerge from the pandemic, we should give the same focus and resource to addressing the ongoing health challenges that we face.

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MRS AWARDS DEADLINE:
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