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Stepping up



When Dave Lewis joined Tesco as chief executive in 2014, the supermarket was in crisis mode and customers had increasingly turned their backs on the brand.

In his turnaround plans, Lewis focused heavily on listening to customers and opinions from company employees on where things had gone wrong.

Strategic adviser Fraser Hardie, who was brought in to work with Lewis on the turnaround, told the recent MRS annual conference, Insight Alchemy, that researchers must be willing to have an opinion if they want to achieve cut-through at the top table.

"Evidence is only part of it," he said. "If you want to be listened to at the top, you have to go with evidence-based opinion. It requires a degree of bravery to do that."

The relationship between fact and opinion has not necessarily always been a comfortable one, but perhaps 'evidence-based opinion' is a more useful approach than binary conversations about subjectivity vs objectivity. Stepping up and sharing that opinion is required – in some cases, to give us the reality checks we need to move things forward.

Our highlights from the conference (p10) include keynote speaker Claer Barrett, consumer editor at the *Financial Times*. She told the audience not to be fearful, despite a bleak economic outlook, and instead called on the industry to step up. "Providing that insight is your superpower as market researchers," said Barrett.

There is also an important role for the insights industry in helping to constantly

challenge ideas and assumptions, many of which have become so engrained that we may mistake them for facts.

Society is built on such ideas – many of them toxic – and while it is very difficult to extricate ourselves from them, we still need to acknowledge and question them. That was one of the key points made by historian David Olusoga in his keynote at the conference. He pointed out that ideas from the past do not exist only in history books, but pervade and permeate attitudes to this day.

"Recognising that we can incubate these ideas and create, without meaning to, cultures and structures that affect people, is a very hard thing to do," he said.

Understanding that attitudes are woven into the fabric of society is part of the remit of the researcher, but it's not just about attitudes impacting what people think, what they want to buy, or who they want to vote for.

Pervasive ideas inform everything about how business operates, from processes to innovation to leadership style. The research industry plays an important role in unpicking ideas and spotting areas of opportunity to keep driving growth.

Our conference highlights also include perspectives on how businesses can foster better working cultures, the value researchers – as humans – can bring over shiny new tools such as ChatGPT, and why the industry's representation challenges are far from solved.

If you feel inspired by the perspectives from the conference, or anything else in this issue – or you'd like to share your experiences of 'stepping up' as a researcher – we'd like to hear from you.

Get in touch: katie.mcquater@mrs.org.uk

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A new blend

The Middle East is the birthplace of coffee, and café culture newcomers in Bahrain and Saudi Arabia are increasingly offering a new third place for people, finds Boxclever Lucy Hobbs

I've just returned from a particularly fascinating trip to the Middle East, researching Costa's new international coffee shop store designs, while immersing myself in the café cultures of Bahrain and Saudi Arabia.

The research featured certain traditional elements such as accompanied store visits and interviews with store colleagues. But, just as importantly, I was tasked by my client to conduct some cultural anthropology and immerse myself in the coffee shop world of each market.

As something of an avid shopper (and caramel frappe lover), it wasn't exactly a hardship to have to explore the local souks and shopping malls, visiting a few competitors. But it did mean having to step out of my comfort zone into societies that, from a Western viewpoint, aren't necessarily renowned for their diversity and tolerance. I had to recognise and park my own preconceptions, to look at these cultures with empathy and openness – essential skills for any qualitative researcher.

Without doing this, I wouldn't have grasped the fascinating role that coffee shops play in these societies. In Saudi Arabia and Bahrain, coffee shops are real hubs of social activity – places where people congregate to socialise, work and study, often for many hours at a time and in large groups.

In stark contrast to the dominant grab and go or quick sit down nature of many coffee shop experiences in the UK, here they are destinations in and of themselves. In these markets, many customers view international coffee shops – which are often luxurious in design – as glamorous destinations. I learned that international

brands, such as Costa, are in some ways, examples of how these markets are beginning to undergo real change and liberalisation – something people were eager to discuss with me. In Saudi Arabia, for example, women I spoke to were proud to detail how life was changing for them, celebrating what it meant to have more independence, for example the freedom to travel without a male chaperone, drive cars and benefit from wider career and education opportunities. They described the important role that coffee shops played, being a positive example of a progressive place where they can now spend time independently, unaccompanied by males, in locations that aren't just single-sex.

In Bahrain, our qualitative participants were also keen to explain that coffee shops were the equivalent of Western pubs and bars – lively places to socialise and spend time with friends in the evenings, without fear of judgement.

In addition to this, our participants were also using coffee shops for work and study, so they needed to be peaceful and have all the necessary plugs and sockets to hand to facilitate this.

In both countries, participants were also keen to remind me that coffee shops, and indeed coffee beans, were part of their culture, not an appropriation from the West. We learned that there were opportunities for the design, and indeed the product communication, to reflect this.

So, how did Costa reflect on these findings?

● The company was able to take the insights on shop design and ensure it tailored its design features for new store



openings and refurbishments appropriately for these markets

● It also took on board the findings around how participants were using coffee shops for work and spending time in large groups socialising and taking pictures, ensuring store design incorporated features that would facilitate this

● By using features such as traditional coffee pots and arabica beans in the design and story, Costa could show it was cognisant of the local culture surrounding coffee.

My experiences highlighted a number of things that you need to embrace to make a success of international research. First, it's so important to take your time. It's not enough to just fly in and out of locations in 24 hours. Cultural exploration and analysis requires time to get a feel for



●
“Cultural exploration and analysis requires time to get a feel for how local markets interact with things and what makes any key target audience tick”
 ●

how local markets interact with things and what makes any key target audience tick. So much can be gleaned by immersing yourself in the area, observing people going about their lives.

Second, you must be bold and brave to make the most of it. Such adventures reward those willing to step outside of their comfort zone and explore beyond the confines of the hotel and research facilities. Some of the most important insights I gleaned were from spending time in the souks and shopping malls, visiting competitors and seeing how differently people were using local

traditional shisha caf  versus global coffee shop chains.

It’s also vital to be sensitive to different cultures. In these markets, the sight of Westerners can still be something of a novelty, especially when research is being conducted outside of the tourist enclaves. It’s important to do what you can to blend in and respect the culture. I made sure I observed the local customs, dressing appropriately and making myself as invisible as possible to be the fly on the wall I needed to be.

As researchers, you must also remember that not only are you in the privileged

position of meeting participants, but you also have the benefit of working with local partner agencies. Their inside knowledge is invaluable, not least in advising on customs. It’s important to be inquisitive and take the time to build a rapport with translators and moderators.

While you learn lots by listening to what people tell you, observing how they interact with their environment and with each other can tell you so much about what makes or breaks a retail experience in these markets.

I learned so much just by quietly watching people as they enjoyed being in the coffee shop and engaged with certain elements (and ignored others).

● **Lucy Hobbs is research director at Boxclever**

Licence to thrive

What it means to thrive differs depending on where you live, but a sense of not thriving is shared across borders. Research from C Space has explored the issue.
By Liam Kay

The concept of thriving is deeply personal and eludes a definitive answer. Thriving is a universal need, but a personal experience. To understand how lifestyle, culture and media impact people's views of what it means to thrive requires asking them what helps them live well on a day-to-day basis.

Research agency C Space carried out qualitative and quantitative research across the UK, US, India, China and Germany exploring how people define thriving and what role brands can play to help them live better. We wanted to get deeply human with people and at some degree of scale, so we weren't talking to the white Anglocentric version of ourselves, says Bill Alberti, managing partner, human truths, at C Space parent company Interbrand. We wanted to see if this was across geographies.

The research consisted of qualitative

discussions via an online community with 502 participants, 30 in-depth interviews, and a nationally representative survey, all conducted in 2022.

A few common factors emerged as helping people thrive: living sustainably, healthier lifestyles, self-expression and connecting with the wider community. The quant found more than half of consumers across all five countries wanted support from brands to help them thrive, with the cost of living the top concern in the UK and US. There was a similar picture in Germany, where financial security was the main concern.

There were also differences in outlook: 61% of Generation Z respondents in the US were optimistic about their future compared with 49% of the same age group in the UK. Social media was singled out as having a detrimental effect on people's lives, with 83% of Generation Z in the UK feeling pressure to reach certain life milestones such as being in a relationship.

Many people across the study expect a closer relationship with brands and for these to play a greater role in life satisfaction. Between 42% and 51% of respondents across the five countries studied agreed that brands and corporations should make it easier for consumers to live better lives.

This differed between countries: while

the UK and India were more focused on practical help with finances and the cost of living, China and the US were more receptive to brands supporting self-expression and better lifestyles. In Germany, sustainability and buying more locally were popular.

Brands have an opportunity to shift the conversation in a way that helps consumers, says Sophie Gaskill, executive director, brand at Interbrand. Brands absolutely are a part of the solution. But it is about going deeper on human truths and committing to them.

This is a big change for some brands. Competitive advantage used to be fixed: you had your product, you had technology, you had your competitors, Gaskill explains. Since then, the world has sped up, and increasingly it is the relationship with the customer that forms the main part of competitive advantage: what brands can work around and invest in.

However, the other half of consumers felt brands added to existing anxieties. Part of the problem highlighted in the research was companies selling easy promises of better health, versus supporting people in the long-term process of getting better at living.

For example, one research participant from India set out how she thought some brands were adding to the stresses and strains of modern life: If you were to look at what's stopping me from thriving, it is anxiety and self-doubt. And I know that comes from within, but I also feel like if you were to actually dig really deep down and figure out where that anxiety is coming from, I think it's brands. I mean, they don't really cater to people's wellbeing.

For many people, brands can be a help or a hindrance.

Christian Purser, chief executive at Interbrand London, says: Few brands are doing a great job helping people thrive, because most are focused on how to sell more, rather than addressing what consumers fundamentally need: in this case, offering promises of better health versus the more holistic and long-term process of thriving.



Lived experiences

Image credit: RECLAMA Project 2022

Peer-to-peer interviews have documented the rich heritage of black and Afro women in Ecuador, to recognise and share knowledge as part of an oral history project. By Katie McQuater

The Esmeraldas region of Ecuador is home to the country's biggest Afro-descendant population, historically a marginalised community that suffers negative impacts from the extraction of natural resources from their territories.

Against a context of poverty and instability, a research collaboration between Northumbria University, the Universidad San Francisco de Quito in Ecuador, and black feminist arts organisation Mujeres de Asfalto Collective, sought to explore the heritage of black and Afro women living in Esmeraldas. This was done through participatory methodologies, with funding from The British Academy and the Global Challenge Research Fund's heritage, dignity and violence fund.

The RECLAMA study began in late 2019, to explore ways in which heritage can be used to support sustainable and gender equitable development.

Katy Jenkins, professor in international development at Northumbria University's Centre for Global Development and project lead, says it was important for the work to give visibility to women's experiences. 'For them, what was really important was the opportunity to be able to tell more positive stories around black women and their agency in this very difficult context where black women are generally not visible,' she says. 'If they are,

they're often portrayed either as victims or in a highly sexualised way, so it was really important to everyone involved that there was an opportunity to bring to the fore and celebrate very diverse forms of Afro-Ecuadorian women's culture.'

Research direction

At the heart of the project was the training of 16 Afro-Ecuadorian women as peer researchers, who conducted life history interviews to capture the knowledge of older generations, recording stories and making them accessible as part of a permanent community archive.

Mujeres de Asfalto Collective, led by Juana Francis Bone, led a two-day hybrid training event, where the peer researchers were coached on practical elements such as using recording equipment, and issues around ethics and consent.

Increasing insecurity in the region created additional difficulties and the project needed to pause a couple of times to ensure researchers could travel safely.

Shared histories

The research explored memories, experiences and knowledge with Afro-Ecuadorian women, and asked them to share ideas on issues around sustainable development. The 60 life history interviews to emerge covered themes including dance,

poetry, song, traditional dress, food and cookery, and spiritual practices. With this knowledge typically shared and passed down orally through generations, in many cases the work was the first time knowledge had been formally recorded.

'It has been important to get recognition and visibility for the really diverse forms of Afro-Ecuadorian women's knowledge that exists in the community,' says Jenkins.

Participants also produced a range of artwork to reflect and represent their heritage, including postcards, photography and recipes, with work exhibited in Esmeraldas and Quito, Ecuador, as well as in Newcastle upon Tyne.

Findings have also been shared with national and international dignitaries, including the mayor of Esmeraldas and the British ambassador in Ecuador.

The researchers are now looking at how they can develop resources for schools in Ecuador, as well as working with partners in the country to 'impact on policy and on the curriculum,' says Jenkins.

'We want to develop a set of resources that we can use in schools with children to ensure that positive, diverse representations of black and Afro women are visible... and to work with partners in Ecuador to use these narratives and resources to make positive change and have more positive representations of black and Afro women in the public sphere.'

● **Project website:** proyettoreclama.wixsite.com/reclama

From survival to growth

In this challenging economic environment, research can turn base data into the necessary insights to transform business, public institutions and society. Katie McQuater, Liam Kay and John Reynolds report from Insight Alchemy 2023, the first in-person Market Research Society annual conference in three years



Insight superpower needed in turbulent times

The market research industry should display its 'superpower' of insight to help navigate brands through the current choppy economic climate, said Claer Barrett, consumer editor at the *Financial Times* (pictured).

In a keynote session, Barrett said the industry should not be fearful about the future, despite a bleak economic outlook.

'There are going to be tough times ahead,' she said, and clients 'are going to have to fight harder to retain [market] share.' But there is an opportunity for the research industry to showcase its insights to help brands show why they are better than rivals.

'Providing that insight is your superpower as market researchers,' Barrett added, urging the industry to 'prove your worth to clients.'

Elsewhere in the session, Kelly Beaver,

UK and Ireland chief executive at Ipsos, called on brands not to repeat mistakes they made during previous crises.

She said: 'Often, in times when there is more economic uncertainty, we see our clients make a few, quite common, errors.'

'One, they become internally focused, and that is not what you want to be doing. In a time of crisis, you want to be focused on your consumer, your citizen or your audience.'

'Second, they focus heavily on cost reduction programmes at the expense of being able to innovate and plan for the future.'

Beaver said it is the role of the research industry to help clients continue to innovate and see the 'wood through the trees.'

Also on the panel, Tamara Rogers, chief marketing officer at Haleon, stressed



the important role that the market research industry can play today.

'Having somebody who can shine a light on truth, digging deeper and truly understanding human behaviour is crucial,' Rogers said.

Metrics still necessary to analyse toxic ideas

Survey questions asking participants to categorise themselves by race are still essential to provide a metric for understanding society better, according to historian David Olusoga.

Speaking during a keynote interview, Olusoga (pictured) discussed the approaches used to capture data about people.

In response to a question from interviewer Sinead Jefferies, senior vice president of customer transformation at Zappi, about



whether the use of categorisation and labelling in research survey questions can perpetuate negative stereotypes, Olusoga said: 'In some ways, I want to make the case for the power of ticking boxes. I understand people's sensitivities about those categorisations, but I worry we complain about them too much.'

'If you pretend race doesn't exist, then you are also pretending that racism doesn't exist, and the outcomes of racism don't exist - and that is washing your hands of reality.'

Olusoga continued: 'Some things are not identities - they are metrics. We are going to need a metric for people who are visible minorities. In a Nigerian Geordie, and that's pretty specific. We need to distinguish between identity and the need to have metrics to try to analyse how toxic ideas are affecting society.'

Olusoga also discussed how ideas from 300 years ago are pervasive and still affect

society today. 'Those ideas are not just important to historians; those ideas live on. We need to recognise and be honest with ourselves about the fact that we internalise these ideas. We have imbibed the attitudes and cultures of society,' he said.

'Recognising that we can incubate these ideas and create, without meaning to, cultures and structures that affect people, is a very hard thing to do.'

It is essential for everyone to notice, acknowledge and challenge biases, he added.

'Unless we admit, and are vocal, when we catch ourselves, and not go to being defensive, then we have real problems.'

'As human beings, it is literally no fun, but that is the big ask if we really want a more equitable society.'

● **A profile of David Olusoga will be published in the July issue of Impact.**

Forget the hype around AI ■ focus on added value

Artificial intelligence (AI) could be a game changer for market research, but researchers should not overlook the strategic value they, as people, bring to businesses.

Andrew Jerina, head of research at Flume, told the conference: "Every so often, something comes in and gets a lot of hype. You go through that period where we're in with AI, where everyone is scrabbling around for what it's going to do and how it will transform things, but what actually happens is it transforms what we do in incremental ways.

"There's a danger we are chasing after AI and forget about the fundamental objectives of understanding people overall, and that a range of methods is good. We should be open to new methods, but we should be sceptical about them."

Zoë Ruffels, global head, vice president insights, at Mars Pet Care, said researchers need to make sure they are advocating the right tools for the right projects.

"There's a considerable amount of hype in the industry about new techniques. The problem is, stakeholders get wrapped up in that hype, and disruption is often conducive with annihilation and replacement of everything that existed before," she said.

Ruffels called for less "wild" and more "wise" experimentation with innovations such as AI, with clarity on why new tools are being introduced in the first place and the value they could add.

"It is not experimentation for experimentation's sake; it is what value you can add through that data or capability that can bring competitive advantage, deeper insight or that new perspective our competitors don't have."

Paul Hudson, founder and chief executive at FlexMR, argued that AI could be a game changer, if used correctly. "The tricky part with AI is working out where it adds value, how to use it, how to build it into what we do without it destroying the other quality tenets we have built. Understanding how to make use of it will be difficult."

He added that researchers need to stop focusing on data and instead concentrate on providing interpretation to support business decision-making. "The world has moved on. Data is democratised. But the thing people don't understand is how decisions are made," he explained.

"We understand a lot about how consumers make decisions, but I don't think we understand anywhere near as much about how businesses make decisions."

Hudson concluded: "Let's understand more about how decisions are made and talk less about the collection and method."

Rose Tomlins, brand director at Bally Interactive, said the constant pursuit of innovation was overshadowing the insight industry's biggest strengths.

"What has struck me is how much we anchor our value on methodologies, and how much we think we are adding value by doing something better and more innovative," she said. "By doing that, we are massively undervaluing our strategic value and importance."

Many businesses are already drowning in data, she added. "What we need now is less numbers and more of the understanding behind them."

Give researchers freedom to make an impact

Autonomy is key to fostering wellbeing and creating good working cultures that people want to be part of, according to Patrick Collins, consumer insights director, EMEA, at Netflix.

Speaking during a panel on how research leaders can build stronger teams in a context of wellbeing challenges and talent shortages, Collins said: 'I see it as my job to set the culture so that my team can do the best work of their lives, be happy and have a good work/life balance.'

For Netflix, freedom of responsibility is a key tenet of the company's approach to culture, explained Collins. 'Increasingly, I feel that we need to give people the space and freedom of responsibility to have an impact on their world,' he said.

'I try to get my teams to try something new. If it fails, it doesn't matter; it's about honourable failure. You have an area, resources and your own brain, and it's my job as manager to support you.'

Accountability is an important part of the equation when it comes to giving teams autonomy, said Ann Constantine, formerly head of insight, marketing effectiveness and customer experience at Direct Line Group: 'Accountability is a two-way thing. Accountability and autonomy go hand in hand; if you give people the space and freedom they need, that's a great way to manage, but there has to be accountability over what is delivered and when.'

As a people manager, you need to be very clear about what you

are asking people to do, and why. 'Being a manager is not a side hustle,' she added. 'It's a priority and part of your job. You shouldn't feel guilty about sitting with someone for half an hour over a coffee.'

Opinium chief executive and panel chair James Endersby pointed to the industry's wellbeing challenges, as highlighted by the recent Opinium and MRS survey on the issue, and the question of talent shortages. He observed that now is a crucial time for the industry because of these factors, saying: 'We have got those two forces coming together.'



Try harder to reach 'hard to reach' communities

Kenny Imafidon, co-founder and managing director at ClearView Research, said he entered research because he saw a lot of work that was 'talking about people like me' without engaging those communities.

'Don't like the lazy narrative of 'hard to reach' from Imafidon said. 'The issue is that the industry hasn't taken responsibility and hasn't bothered to engage.'

Imafidon added that more work is

needed to engage people in research, rather than simply accepting the issue and charging clients more to conduct research among diverse communities.

More participatory research is key, he added: 'A lot of people will do research about people without ever engaging with them. That's where a lot of insights are lost.'

He concluded that the industry needs to maintain focus on addressing diversity

issues: 'It is not about ticking boxes; it is understanding this is a never-ending journey. You have to keep up the momentum and people are on different places on that journey.'

Speaking on the same panel, Rebecca Cole, managing director at Cobalt Sky and chair of the MRS Representation in Research Group, said there had been progress in making nationally representative samples include factors such as ethnicity, disability and sexuality.

She called for a 'principles-based approach' to more diverse research, including practices such as avoiding assumptions and involving people in the design of research programmes.

Peter Totman, director at Jigsaw Research, said there was 'work to be done' on tackling preconceptions of Brexit voters. However, he said he was 'unfashionably optimistic' that things are moving in the right direction, adding that clients were specifically asking for more diverse research.



How research can be indispensable to the boardroom

Fraser Hardie, senior adviser at Teneo, who worked with Tesco during turnaround efforts at the business in 2014, outlined the importance of insights teams being able to share their opinions with a view to help inform decision-making at the highest level.

Evidence is only part of it. If you want to be listened to at the top, you have to go with evidence-based opinion. It requires a degree of bravery to do that. You need to routinely be braver and when you do, you give people choices," said Hardie.

Give your opinion and the evidence to support your opinion. Chief executives can't predict the future and neither can you, but you can help to navigate the way.

Key to that is businesses investing in skills, according to James Sallows, global head of transformation and capability, consumer and business insights and analytics at Haleon, who said: "We can't just expect insights people to be comfortable giving opinions without investing in those skills. Building the credibility of the function and empowering people and giving them the chance to practise those skills is key."

Being at the top table might mean making trade-offs, said Catherine Hunt, head of analysis at the Foreign, Commonwealth and Development Office, as she discussed her experience of producing evidence for the government during the pandemic.

Hunt said: "We were pushing research to deliver in ways it hadn't done before. We were running focus groups overnight and running polls every night. Yes, there are trade-offs, but if you want to be at the top table, you have to be there helping the people making the decisions, right then."

Hunt added that there was a realisation that research can be pragmatic, can be nimble and can evolve.

She said: "Sometimes it might be possible to say: 'Give us three months' and sometimes it's about saying: 'What do you need? We see what we've got now'."

● For more coverage of *Insight Alchemy 2023*, see [researchlive.com](https://www.researchlive.com)



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The wine man



Andrew Carter has his eye firmly on a future that is fizzing with potential. Jane Simms sits down with the chief executive of wine producer Chapel Down to talk leadership, building brands and buying British

When Andrew Carter joined the UK's leading wine producer, Chapel Down, as chief executive in September 2021, he rolled up his sleeves and, as he puts it, "learned from the bottom up".

It was harvest time, so he helped pick the grapes and did night shifts alongside colleagues to help process them. "I may be an industry veteran," he says, "but I have held senior leadership roles at Bacardi, Treasury Wine Estates and Bulmers, among others. But you've got to understand every part of the particular business you're joining; how it operates, what people do."

Before he joined Chapel Down, which is based near Tenterden, on the edge of the Kent Weald, he'd been managing director of Chase Distillery, leading the growth of the gin and vodka business across 30 international markets before selling it to Diageo.

He was hired by Chapel Down's non-executive chairman Martin Glenn – the man who, as chief executive of the FA, appointed England football manager Gareth Southgate (no pressure there then, jokes Carter.) Glenn describes Carter as "a very complete chief executive, who understands that, however good the product and the brand, it's people who make the strategy happen".

Glenn says his track record of success in a range of different environments, along with "willingness to learn, and real wine empathy" made Carter "the right man for the job" – which was to accelerate the profitable growth of an already successful business, turn it into the foremost and most celebrated English winemaker, and permanently change perceptions of English wine throughout the world.

In January, Carter was recognised in the 2023 Power List from Walpole, the UK trade body for luxury brands, as one of the 50 most influential people in British luxury. He was included in the Rainmakers category, which recognises "business leaders who magically bring the revenue in, ensuring prosperity for their company".

"Yes, I do have a lot to live up to," he laughs.

His first job, after a degree in economics and agricultural economics at the University of Exeter, was in brand management at consumer goods company Reckitt Benckiser (RB), based in Hull. After six years, he switched to the drinks industry and far preferred the "emotive" category to the "functional" brand makeup of RB. But his role at Chapel Down feels like coming home. "My passion was always wine," he explains.

When he joined Chapel Down, he set out to double the size of the business by 2026, by: improving the quality of the wine through transforming the vineyards and winery; increasing the proportion of higher-margin English sparkling wine versus still wine; and growing distribution in the on and off-trade, in the UK as well as overseas. Underpinning these operational challenges would be a robust marketing and communications strategy, and a leadership team and culture that could help him achieve his objectives.

Chapel Down, in common with many English vineyards that have developed over the past three decades, had been entrepreneurially led, and, while it had built a strong brand, it lacked the business systems that would guarantee sustainable growth.

Thirty years ago, the English wine industry was largely making still wines, predominantly using the bacchus grape to create an equivalent of sauvignon blanc. In the early 1990s, English growers began to plant sparkling grapes, and are now producing world-class, award-winning wines. Consumer perception has changed accordingly, but for all the enthusiasts, hobbyists and family businesses, who have all done a great job," says Carter, the next stage of growth requires a far more professional approach.

Carter describes himself as "authentic, passionate and results-driven" – a leadership style that's already paying dividends.

The company's premiumisation strategy is reflected in a 10% rise in net sales revenue for the year ending 31 December 2022, to £15.6m, driven by a 53% surge in sales of sparkling wine – which, with a record 790,000 bottles sold last year, now

accounts for 70% of value sales.

Sales rose in both on-trade and off-trade, thanks to a threefold rise in distribution outlets, to around 1,500 (Chapel Down sparkling is served in establishments such as Le Gavroche and the Savoy, and pub groups such as Mitchells & Butlers and Greene King) and a rise in supermarket listings, which now include Tesco and Morrisons.

A 164% rise in export sales revenue, albeit from a small base (exports account for just 3% of sales), reflects growing overseas interest and potential for English sparkling wines, notes Carter. The brand is in 14 markets, of which the US, Scandinavia, Japan and Hong Kong are the most important.

Much of this success comes from rising brand awareness. Chapel Down has a clutch of high-profile partnerships with sporting and arts bodies – and for a man who's almost as passionate about cricket and horse racing as he is about wine, it is a source of satisfaction to Carter that the brand has sponsored a race at Ascot for the past five years. Last year, it also became the official sparkling wine of the England and Wales Cricket Board.

But there is still "so much to go for," he enthuses. Figures from industry body WineGB (Wines of Great Britain) put the total UK sparkling wine market at around 223m bottles, of which 29m are

“You’ve got to understand every part of the particular business you’re joining; how it operates, what people do”

● Profile Andrew Carter

champagne and 5.8m are English sparkling wine, with the balance made up of prosecco and cava. According to champagne industry body CIVC, the French produce 330m bottles of champagne every year, 180m of which are exported.

“The opportunity for growth, at a UK and international level, is vast,” says Carter.

Currently, just 35% of sparkling wine drinkers in the UK (according to BrandVue) are aware of the Chapel Down brand, he notes, despite a slew of awards (38 in 2022) recognising its quality. “But over half of the company’s current consumers think Chapel Down sparkling is as good as champagne, with around two in five preferring the taste, according to a Chapel Down brand survey in 2022.”

However, though it is 20-25% cheaper than champagne, it’s a lot more expensive than the ubiquitous prosecco and cava: how will Chapel Down persuade more people to trade up, particularly in an economic climate where many are having to tighten their belts?

The “absolute bullseye” target consumer for Chapel Down English sparkling is 25-40 years old and ABC1, says Carter. “However, on the whole, we tend to focus on the typographic element of our consumer target – a group we call ‘the discoverers’ – people who, irrespective of age, enjoy new food and drink, and are interested in its provenance, how it’s made, the story, and so on.” The wine is currently drunk predominantly in London and the South East, but distribution will become more national over the next 12-18 months.

Price aside, English sparkling wine has an intrinsic appeal, Carter continues. People like buying British, particularly when the alternative involves hundreds or thousands of food (or, in this case, drink) miles. “That’s an increasingly important consideration for people,” he says. A bottle of English sparkling is also a more “interesting” choice than champagne, he observes: “When you have a bottle of English sparkling with your friends, or gift a bottle, you’ve really thought about it.”

Nevertheless, Carter has charged Liam Newton, formerly vice-president of marketing at Carlsberg Group – whom he hired as chief marketing officer in October 2022 – with “exciting consumers and making them fall in love” with the brand.

Chapel Down Sparkling is being relaunched this month (April), based on qualitative research by The Big Picture in August 2022, and underpinned by a communications strategy that positions it against champagne – which will be reflected in a digital and press campaign. In addition to building brand awareness and trial, Newton is developing the e-commerce direct-to-consumer channel, and building the thriving tourism part of the business.

To sell more wine, however, you need more grapes – and ensuring you are producing enough to meet growing demand for the wine is, says Carter, “the biggest operational challenge” for any wine business. By the summer, Chapel Down will have more than 900 acres of vineyard and, as well as extending its winery at Tenterden, it is building a new and more efficient winery just outside Canterbury, to increase its processing capacity.

After a poor harvest in 2021, 2022 delivered a bumper crop, including a record tonnage of the key sparkling wine grapes chardonnay, pinot noir and pinot meunier. Carter attributes the success not just to last year’s long, warm summer, but also to continued investment in viticulture and “the skill and dedication of the talented team” led by Josh Donaghay-Dacre, whom he appointed as operations director and head winemaker in early 2022.



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“We will see vine-growing regions start to establish themselves all over the UK”



Donaghay is one of more than half of the 75-strong team at Chapel Down who stayed on after Carter joined, and who, says Glenn, have thrived on the change of emphasis he has ushered in. Andrew works very hard on extracting the right talent and inspiring and motivating the people he's got, notes Glenn. He has helped drive a high performance culture, leading by example and promoting the people who demonstrate the right values.

Newton describes his boss as a balance of challenge and support, big picture and detail. He's ambitious, challenging and restless, he says. You get a constant stream of WhatsApp messages, but they are all thoughtful and designed to move things forward and make us as good as we can be. Carter doesn't have a big ego, he adds, and, importantly, he enjoys the category and has fun.

Notwithstanding the team of what Glenn calls a competitive completionists, Chapel Down has suffered from a shortage of seasonal employees to work in the vineyards and winery throughout the year. We would typically have about 150, but Brexit has really affected that, says Carter. We hope the government will expand its seasonal workforce scheme.

Carter believes England is on the cusp of being a truly established wine region of the world. How have we reached this point? The Romans grew grapes in Britain, in small pockets and probably of dubious quality, and let's not forget, says Carter, although the French prefer to think that it was an Englishman, Christopher Merrett, who first documented the English production of sparkling wine in 1662, 35 years before the French monk Dom Pérignon. But much of the success of the past 30 years is to do with climate change, he says.

The bitter-sweet part of global warming for us is that temperatures in the UK have risen by a whole degree over the past

three decades, meaning that summer temperatures in south-east England are the same as they were in the Champagne region in France during the late 1980s. We also share the same tectonic error—the chalk seam that starts in Reims and Rheims, and dips under the Channel, to emerge in the white cliffs of Dover and down into the English sparkling wine-growing territory of the North Downs.

The only thing that's different is that we have more of a maritime climate than a continental climate, which means we have fewer hours of sunshine, and a little more rain, but our growing season is longer, Carter continues. That means the grapes we produce are on the vines slightly longer, which is why they produce wines that are slightly more elegant, crisp and fresh than champagne.

That's all well and good, but the French know a good thing when they see it, too. Pommery and Taittinger, along with Spanish-German company Henkel Freixenet, have already snapped up land in southern England. Will there be a land grab for grapes?

There is plenty to go for, says Carter: there are already 10,000 acres of vineyard in the UK, and a great deal of suitable land, currently used for arable or fruit, still to be negotiated over. As the climate warms, wine growing will spread, he predicts.

The South East will be the heartland of English wine, but there are already eight vineyards in Yorkshire, a couple in Scotland, and they go as far west as Wales and Hereford, he adds. We will see wine-growing regions start to establish themselves all over.

In the meantime, Carter is relishing the exciting and unique opportunity he's been given to spearhead the creation of a new and celebrated wine region. It's a huge legacy-style project.

When will he know he's succeeded? When the French start drinking Chapel Down English sparkling wine, he grins.

The international insight pipeline

Translation technology is playing a bigger role in the international insights ecosystem, as research technology becomes an increasingly vital part of the global research toolkit. Rob Gray reports

Consecutive years of worldwide disruption have sent shockwaves through global economies and socio-political systems. Labelling this a period of Vuca (volatility, uncertainty, complexity and ambiguity) is perhaps an understatement. Business publications, thought leaders and other members of the commentariat are generally in agreement that, in these tumultuous times, businesses must be agile if they are to survive and prosper – and agility is underpinned by technology.

That's as true for research as it is for other sectors, but when it comes to conducting international and multi-market research, the challenges are magnified. Language is the most obvious potential stumbling block, but there is a host of others, from varying cultures and consumer habits, to differing stages of economic development, to consistency in data collection.

Research technology – or 'retech' – has a growing role to play here; for example, by automating the sample process or offering clients 'do it yourself' access to data collection and insight. A sophisticated market research tech stack potentially offers the opportunity to conduct research at a scale and speed that was unimaginable until quite recently. That's an enticing prospect, particularly for those involved in cross-border research, yet it hardly needs saying that researchers and clients must ensure rigour and accuracy are not sacrificed in a dash for quicker results and greater efficiency.

Advances in translation

Translation technology (transtech – see boxout on terminology, p23) increasingly figures in international research projects, and getting reliable and useful results calls for considerably more than simply bunging some text into Google Translate.

Ruth Partington, founder and chief executive at insight localisation agency Empower Translate, asserts that there are commercial benefits to having some knowledge around transtech – for instance, in understanding terminology such as translation memory (TM), a database of previously translated text.

If you researched digestive biscuits, for example, and now want to research shortbread, there are obvious shortcuts in accessing this previous translation work. Some of the questions (and indeed answers) might be the same, so there are time and money savings to be had. Yet, Partington cautions, the savings of automation will not be as great as some researchers might hope, and there is still a necessary role for human quality control.

Consistent effort is needed to drive bottom-line results from TMs. However, explains Partington, TMs get "dirty" when approved translations are added to the bank and become mixed in with similar translations.

If they are not regularly maintained by a specialist linguist, they will produce faulty translations.

"You can decide on what percentages and sensitivities you set and that speeds up the translation process reasonably significantly, cutting down the human-in-the-loop translation time by, maybe, 50%," says Partington. "But where the real gains are for the research element is when transtech is properly layered into a project and into a client's workflow. You can cut a timeframe for turning around translation by more than half."

Working with InSites Consulting (now Human8), Empower reduced by 50% the time to market for multi-market medical surveys for a pharmaceutical client. At the centre of this was a cloud-based portal designed to eradicate some translation pain points for global researchers. By examining a cross-section of quotes produced by Empower's team for research agencies over the years, the company saw the opportunity to create an algorithm that would produce instant quotes for global research projects. This reduced the time taken to commission from between four and 10 hours (depending on the project details) to 60 seconds: the time it takes for a client to upload its files to the portal for analysis and click the 'confirm quote' button.

Rebecca Cole, managing director at Cobalt Sky, currently chairs the MRS accredited company partner council. This is working on a project, headed by Partington, that aims to release a standard set of questions that research buyers can ask of translation agencies. Increasing transparency around transtech will be a big part of this initiative.

As someone who procures translation services and implements them into online surveys – as opposed to being a translations specialist directly – Cole considers the main effects of recent advances in transtech to be an ever increasing need for trust in, and a good relationship with, translation agencies. In her view, it has become more vital for the industry to provide easy ways for buyers of translations to differentiate the good from the bad.

"Transtech advancements have meant it's sometimes a bit of a Wild West out there," says Cole. "As with any technology, used correctly and in the right hands it can provide huge benefits to all parties: reduced costs, reduced time to market, stronger and more reliable results. But, in the wrong hands, or people using DIY tools such as Google Translate, it can lead to incorrect and lazy translations, longer time in the field because of increased respondent dropout, reduced quality of responses because of reduced engagement, and lack of professionalism being shown to respondents. Research buyers need to first identify who the quality translation agencies are, and what questions to ask them

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**"Transtech advancements
 have meant it's sometimes
 a bit of a Wild West
 out there"**
 ●

to find out how that company is using transtech, and to what extent.”

Not everyone uses translation agencies, however. Discover.ai, a tech based insight start-up drawing qualitative and cultural insight from online text-based sources (for example, blogs, forums and social media), focuses on multi-country projects and harnesses transtech, its own artificial intelligence (AI)-based model, and a network of local partners to access insights from multiple markets in their local languages. For example, it has partnered with PepsiCo in diverse cultural spaces, including hard-to-reach markets (the Philippines, the UAE and Honduras). This allows PepsiCo to access a deeper understanding of consumers’ needs, behaviours and attitudes in different geographies.

The platform uses Microsoft Translate for its automated translation services, with translation done as the data is collected. The English-language content is then run through the firm’s algorithms and analytical frameworks, before being analysed by strategists.

“It’s not just about opening up lesser-researched markets; it’s about getting cultural and expert angles, plus accessing hard-to-reach audiences with low incidence rates; they may be hard to recruit, but they often talk a lot online,” says Jonathan Williams, founder at Discover.ai. “There are limits here, though – but that has less to do with technology and more to do with cultural understanding. Agile solutions will give a good multi-country overview, but the more you can get this delivered by people with local cultural expertise, the more value you will get from it. There comes a point when full local research is needed to land strategies in a locally relevant way.”

Ensuring cross-border transparency

One common worry clients may have regarding international projects is inconsistency around methodologies across markets. Even if a research partner has respondent pools across a range of regions, they may use different methodologies or fulfilment companies to source respondents in each region.

Jamie Parks-Taylor, director of insight and analytics at advertising agency Cream, has concerns about discrepancies in approaches to sampling between markets that undermine cross-border comparisons. To improve agility without sacrificing quality or accuracy, Cream works with partners with on-the-ground support in each market – for example, Kantar’s software-as-a-service (SaaS) offering, Marketplace. Parks-Taylor sees increased demand for restech solutions from clients who are a little more sophisticated in terms of research understanding, or clients that operate in industries that are more inherently “fast-paced” or tech-savvy. Innovations in restech, such as DIY SaaS platforms and research tools that use AI, are often requested by tech clients who want results quickly and understand the pros and cons of AI in the research domain.

“The adoption of AI in research solutions is exciting,” says Parks-Taylor. “If predictive AI can replace the role of a human respondent in a survey, it has the potential to offer insights that are just as reliable and accurate, while saving time and money if the results can be delivered faster, with a smaller cost incursion that can be passed on to the client. But that’s a dream scenario.”

Carlsberg Group vice-president of insights and analytics Nick Rich agrees it’s an exciting time for insights professionals and insights function leaders.

A short guide to transtech terminology

Neural machine translation (NMT) engines.

These automate the translation of words and phrases from one language into another and should not be confused with artificial intelligence or machine learning. Google Translate is an NMT, but because the free version is not ringfenced, researchers must not use it to translate responses that may contain participants' personal data, as this would fall foul of data protection regulations.

Translation memory (TM). Differs from machine translation in that it is bespoke to specific work and allows for the building of a bank of previously translated sentences. These 'segments' can be applied to future surveys using a computer-assisted translation (CAT) tool. TM banks tend to be grouped by individual clients or related surveys, and are typically complemented by a 'termbase' of specific words.

Restech with multilingual capabilities. One increasingly common approach to gleaning insights from unstructured data is adding multilingual capabilities to existing restech platforms. For example, boosting AI tools such as audio-visual captioning software Sonix with multiple languages can be very useful – building in software functions that work in another language avoids the need for translation.

"It feels like we are leading among all marketing functions in the progress we are making to better operationalise and realise tech solutions into our function and ways of working," he says.

With restech solutions appearing across almost every element of the research process and insights value chain – from data collection to analytics, through insights communication and longer-term knowledge management – they are resolving legacy pain points while addressing inefficiencies in the research process.

Trends observed by Rich are: restech that drives quicker and comprehensively uniform multi-market data collection; restech that enables enterprise data management and analysis; and restech that drives more effective knowledge storage and accessibility, such as Stravito, which Carlsberg uses. In the past, Carlsberg has been "somewhat underwhelmed" by certain AI solutions. However, Rich expects further improvements will probably have a profound impact. "Right now, that looks like solving some of those same legacy challenges we have always had – synthesis, summarisation, simplification, communication, and shortage of 'time'."

Technology as a driver of international affordability

Tim Wragg, chief executive at Hall & Partners, thinks the biggest trend from the rise of restech is a levelling of the playing field. With the right tools and talent, a direct-to-consumer start-up, for example, can make an ad, research and assess it with the same level of accuracy and insight as a giant fast-moving consumer goods player. In essence, AI and machine learning (ML) are democratising research at a market and cross-border

level because the price point is affordable for everyone. "The big brands have to find competitive advantage from their scale in other ways now, whether that's first-party data or something else," says Wragg. "But no-one can afford not to take advantage of the restech revolution."

Hall & Partners recently worked with the global insight team at a delivery company that sought to improve the immediacy and impact of insights from across the business. It wanted to accelerate the speed of reporting from three different trackers and find an alternative to time-consuming PowerPoint reporting and data requests.

Hall & Partners combined data from the trackers to create dashboards accessible to users across the

organisation. The team used the information to publish internal articles inspired by important themes and findings. Once use of the platform became widespread, search, spend and app download data was added, and the audience widened to encompass every tier of global management. Sharing stories from different markets helped identify common problems and highlighted cultural differences for leaders to factor into their decision-making.

Phebi, whose software is used to find insights in voice and video data, has seen an increase in multi-country qual and customer experience work where clients are looking for a consistent, quantifiable way to do analysis across markets. On a project basis, says chief executive Mike Page, multinational agencies are collecting data via audio and video, and providing Phebi with audio or video files. The software then does machine-based speech-to-text transcription and translation, and makes them instantly available – along with ‘nonconscious emotion scores’ – to local and centralised team members via a portal, for analysis and for developing presentations that include highlight reels of people speaking.

“The most forward-thinking agencies are looking for an easy way to process, analyse, store and revisit all of their human speech assets for studies and trackers, and across studies,” says Page. “They typically want to be able to interact with the data in its original language and in a second language, usually English. Using technology and a centralised approach can result in more consistent and seamless analysis across countries, especially for text-based analysis of the words people use and for voice-based analysis of people’s nonconscious emotions.”

Phebi sees human speech as the richest source of insight on both a conscious and nonconscious level. Page points out that the technology needed to run smoother voice-enabled multinational projects, and gain new insights from them, is available and there is already an uptick in its use. Voice-enabled research software helps collect high-quality responses from often underserved groups with less access to technology, lower or no proficiency in writing, or difficulty communicating using keyboards. It is integrated with tablets and mobile phones used in the field, so respondents can use their own words.

“The transcriptions and translations are fully handled by software, quickly bringing quality results back to local and centrally located researchers in clear, usable language,” explains Page. “In addition, when nonconscious emotions are detected from speakers’ voices, researchers can tap into a new set of insights without hooking up specialised devices that early forms of nonconscious response measurement required.”

Insight Engineers managing director Jeff Deighton says the rise of harmonisation specialists, such as Wessex Insights, indicates a client need for harmonised data. On

“Voice-enabled research software helps collect high-quality responses from often underserved groups”

a separate point, researchers must make contingencies for survey platforms that only operate if connected to the mobile network and so can't be used in rural or remote areas. Insight Engineers has encountered this problem on projects in Africa. The solution? Human interviewers and SurveyToGo on their laptop or tablet, syncing at night or when they are home and have Wi-Fi, instead of live using the Qualtrics data-collection platform.

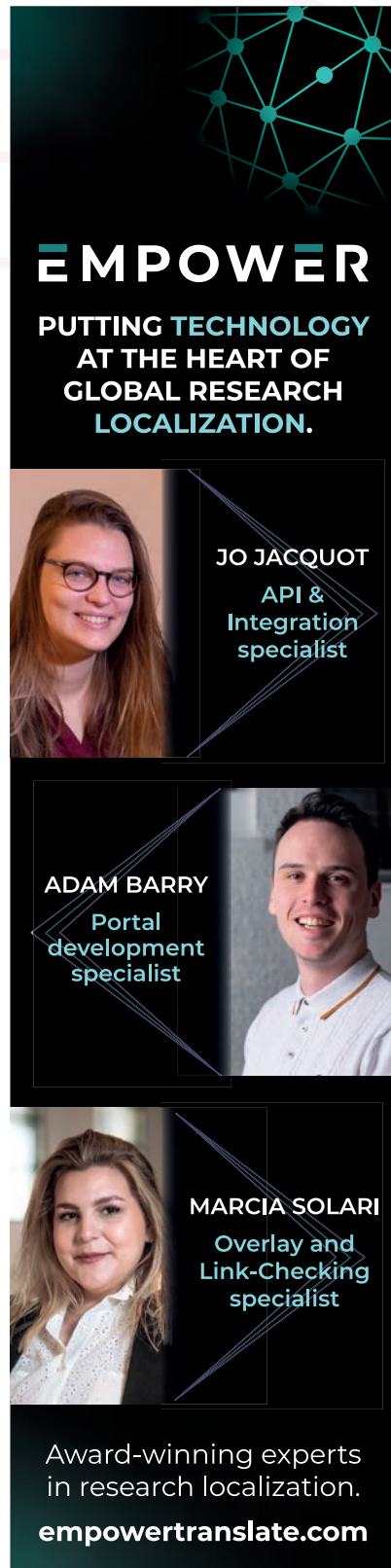
Insight Engineers does a lot of online quant and qual work, and one of the trends Deighton has observed is a rise in “multi-mode projects and more do-learn-do, reconvening participants from phase one of a research project to show what has changed from that input and using them to hone further”.

Poor AI translations continue to be a “blight”, says Deighton. Instead, the company translates initially into other languages with professional translation companies and then back translates with an AI into English, to sense check.

That said, there are also positive signs of transtech improving in the past couple of years. Online qualitative research company High Tech Developments (HTD) recently ran sessions for the World Health Organization, which wanted to listen to and engage with a multilingual panel of doctors who were frontline Covid-19 responders. Japanese, Korean, Chinese, Taiwanese, Australian and Singaporean doctors had their own simultaneous translation so they could listen to everything being said – and so could the observers.

HTD offers AI, personally identifiable information-redacted transcripts direct from the Amazon AWS network. Chief operating officer and co-founder Rob Wallis says: “We also use AI to detect filters used by respondents to mask their true identity.” To date, Asia is the only part of the world in which HTD has discovered identity masking. “Quant and qual are merging and a lot of traditional researchers are not happy,” says Wallis. “The biggest reason for this is that the developers who design the platforms have no true understanding of what both worlds involve.”

It's up to researchers to get on top of these issues. That is happening already. As Empower's Partington explains, the insight industry is now “much more interested in intelligent integration” with partners who have a strong value proposition. Often, that will entail marrying restech and transtech to get the best of both worlds, settling on a smart balance of automation and human expertise.



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Functional effectiveness: when operational efficiency trumps new technology

What if there was a low-resource way to considerably reduce costs, increase profits and retain clients – without relying on new technologies?

In 2018, IBM recognised the role of business process management in allowing all business operations to function together efficiently, ultimately to serve customers better. In particular, our fast-paced, disrupted industry benefits, where assessing the health of your business processes can be as effective as adopting new restech.

For global research, it has been proven that improving the 'functional effectiveness', or operational efficiency, of technological touchpoints can reduce the time to market of international surveys by 50% (winning case study, MRS Operations Awards 'Best Support Services' 2020). Business process management has equally been lauded for:

- Reducing costs
- Increasing profits
- Greater utilisation of resources
- Increasing customer satisfaction
- Improving working conditions

- Enhancing equality, diversity and inclusion
- Reducing negative environmental impact

Business process management can be initiated in two steps, broadly speaking.

The first is to establish standard operating procedures between your research/data analysis teams, your key clients, and your supply chain. Identify tasks, specify who is responsible for them, and establish in which order they are to happen. Include any specialist terminology or potential concerns. From there, you have the means to mitigate the risk of miscommunication, ensure regulatory compliance, and increase the stickability of your offering to clients.

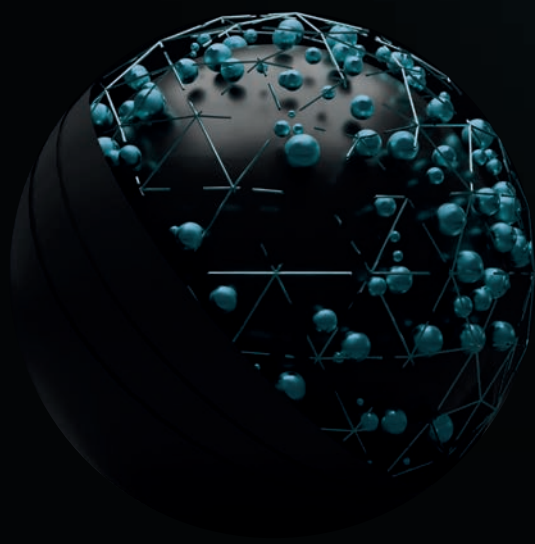
The second step is to map your processes and assess regularly for efficiency. Make your work visible so that you can uncover duplication, streamline excessive controls and introduce automation. Is there an opportunity to work directly in a client's platform, instead of transferring files? Is

there an API between your suppliers' systems that means they can work together directly, without the need for a go-between? Can data be cleansed in-field, rather than waiting until everything is collated?

This *Impact* report comes at a time when we are all feeling the stretch of increased demand and competitiveness of business. Globalisation, modern infotech, higher levels of education, and ease of access to online markets are contributing factors to international research buyers needing results to be faster, cheaper and ever more local. The knee-jerk reaction is, understandably, to reach the shiny new thing on the shelf. Yet we know that the above benefits are at our fingertips.

The next time you reach for something shiny, try polishing the moving parts that you already have – the results will almost definitely surprise you.

● **Ruth Partington, chief executive, Empower Translate**



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Sparking success

Japanese-owned Panasonic is one of the world's biggest electronics companies, but is now using insight to expand beyond the consumer electronics category in Europe. Liam Kay speaks to Shane Hanson to find out more

Kōnosuke Matsushita started his business in Japan in 1918, selling duplex lamp sockets before expanding to other products, including a line of bicycle lamps and electric irons. The company he founded, then known as Matsushita Electric, would later expand into areas such as consumer electronics, cooking accessories and beauty products. That company's name is Panasonic, and it has since become one of Japan's most recognisable exports.

Panasonic is based in, and run from, Japan, but has a strong global presence. This has led it into competition with many regional and global rivals, from Dyson in the UK to Philips in the Netherlands and Braun in Germany. Insight is helping the company increase its footprint in Europe and compete within a cut-throat market.

Despite the size of the company and its long-term presence in Europe, Panasonic has a relatively new insight function on the continent. Rewind five years, and there was no member of staff heading a market research or insight department, or operating in any role primarily overseeing either discipline, across Europe.

Then, five years ago, that changed with the appointment of Shane Hanson, head of insight and innovation. Hanson began her career at Procter & Gamble and held senior insights roles at brands including KP Snacks and Philips before taking on the challenge of building a European insight presence at Panasonic. "I think tech companies are just realising that it

takes a certain skill set to establish this type of best practice," she says.

Hanson faced a sizeable challenge. "They wanted someone who had a breadth of skills when it came to market research, shopper as well as consumer insight," she says. "Panasonic, historically, is known for high-quality televisions, but distribution was restricted to the likes of John Lewis. It was a very premium targeting in terms of the brand's positioning story, as well as the product offering. That made sense to a certain point, but the growth ambition from the headquarters in Japan was how it could build the portfolio and business beyond premium televisions."

It was a slow process embedding herself in the company and expanding knowledge of insights among staff. For the first three years at Panasonic, Hanson stood alone, solely responsible for the company's research work across Europe.

Agency partners and freelance researchers were brought on board, but, otherwise, major decisions were made in Osaka. "Products and the strategy for Europe is developed in Japan," says Hanson. "There will be consultations with local management or the chief executive for Europe and their team, but the decision-making still happens at the headquarters."

In 2019, Hanson decided to get to grips with Panasonic's internal understanding of the value of insight, inspired partly by a colleague's question about what an insight manager did. "She ran several workshops describing what insight brings to the business, but decided to

take this demonstration of the value of insight a step further, by setting up an online training course. "My first module was 'what is insight' with module two being the differences between qualitative and quantitative insight," she says.


"It was really basic stuff, but every month another module was launched using an online platform."

The programme has been deemed a success internally, costing £1,800 per year to run the online training platform, and reaching 436 employees in 20 countries across Panasonic. "It is not easy, but what helps is having one or two people to support and sponsor you," adds Hanson, explaining that the company's leadership has subsequently embraced insight. Her team has since expanded in Germany, with Hanson based in London and reporting to the head of marketing.

A new horizon

Panasonic is arguably best known for its televisions and home entertainment products, but the company's range goes far beyond that, and includes hair and beauty, and kitchen appliances. It is, for example, one of the five biggest hairdryer producers in the world. This side of the business was poorly understood in Europe, however, and was not a major revenue stream. Hanson set out to try to change that, using the UK as a test market.

"The brief was very



clear in order to grow strategically important categories, such as health and grooming, we needed to know what the customer was looking for," she says. "It is all about growing, commercially, our strategic categories that are not our bread and butter. We need a lot of real-time insight for that."

Panasonic brought on board Kantar TGI, which runs survey-based, nationally representative research to identify strategic target audiences for the brand across all consumer electronics categories. This allows it to develop market strategies and understand customer needs as they evolve with age and circumstances.

Panasonic also works with other insight companies globally, including Brand Genetics, CloudArmy and Untapped Innovation,

and has a pulse survey for consumer and shopper views on the brand.

The plan for its beauty section was to carry out primary research across the UK, Italy, France and Germany, and decide how best to market products such as hairdryers in those countries, and which retail outlets to target to stock the items.

Kapil Sampanthan, business development director at Kantar TGI, says the UK was used as a test market to help understand what was needed to bridge the gap between products and market needs. The aim was to know the challenges for Panasonic in the market, as well as who the ideal customer is and how to compete with rival brands. In addition, Sampanthan said the biggest goal was to identify the most important factors driving customers' purchase decisions. "Is it price; is it quality; is it sustainability; is it your packaging? How best do you want to communicate with this consumer?"

Panasonic used the research to inform the launch of its Nanoe hairdryer in Boots stores. The research found a strong association between Japanese

companies and quality products more broadly, and that Panasonic's track history in the technology industry meant it was warmly received by consumers when branching into a new area, such as the premium hairdryer market. The latent quality of the brand could therefore be leveraged to help challenge rival hairdryer producers.

"There is a very high awareness – probably 90% of the population have heard of us. That put us in a very strong position as a brand," says Hanson.

Panasonic's research suggested the UK would provide a good opportunity to test its ability to compete for consumers for premium products and take on a homegrown rival in Dyson. This meant adopting a similar price and positioning as Dyson, with Kantar providing input

on messaging and what would resonate with customers.

The UK findings for the hairdryer research were broadly similar to those for the other three European markets – France, Germany and Italy – tested by Panasonic and Kantar TGI. This was not the case for some categories – for example, kitchen appliances, which showed greater divergence in attitudes between the markets (see boxout).

A new market

In the past two years, Panasonic has introduced further beauty products into the UK, such as hair straighteners, and launched the Nanoe in more countries, such as Poland. The success of the hairdryer research has meant that extra budget has been released in-house to boost its insight capacity.

There have been tweaks along the way. Research by Hanson found issues with Amazon reviews for the Nanoe, with most negative reviews homing in on alleged hair damage. The company altered product descriptions in Europe to ensure the products were used correctly,

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“The biggest goal was to identify the factors driving customers’ purchase decisions”
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Panasonic is looking to challenge competitors in Europe with its men's grooming kits



removing the potential for future negative reviews along similar lines.

For Hanson, part of what drives commercial success is working tech or engineering speak into consumer meaningful language on a customer-facing portal. This requires a deep understanding of consumer needs and how the technology works, then bringing the two together as content for product web pages on Amazon, Argos and Boots.

The research resulted in Panasonic doubling its hairdryer sales in Boots in 2020 and selling four times the number of hairdryers on Black Friday. Selling 5,000 units in a day was unheard of in the history of Panasonic, adds Hanson.

Tracking customer sentiment and attitudes has also shown that the premium market is still holding up, despite a cost-of-living crisis in the UK. Hanson says consumers have become more mindful about where they spend with mass-market items most affected, and the popularity of other, cheaper hairdryers has been hit harder than premium categories.

As a society, we are moving more towards conscious or mindful consumption versus two or three years ago, she adds. That shift is becoming more prominent during this cost-of-living crisis.

With this in mind, Panasonic has begun a project to help better understand who is driving the demand for sustainable products and services across Europe, and what customers are looking for when shopping for more environmentally friendly items, with the research still under way when this article was written. Eco segments research offered by Kantar TGI is being used to understand more about consumer expectations and preferences in this area.

To become a brand that is taken seriously on the topic of sustainability, we will have to adapt our product portfolio, says Hanson.

Just as in the days of Kōnosuke Matsushita, Panasonic is looking at how it can expand into new product categories. This time, insight is helping to lead the way.



Convenience culture

Panasonic has sought to understand the European kitchen appliances market, as part of ongoing work with Kantar TGI, to help its expansion beyond consumer electronics

Kantar helped Panasonic develop a Europe-wide psychographic segmentation model based on lifestyle, beliefs, consumption and shopping behaviours, as well as media habits, using its survey-based methodology.

The research found that kitchen appliance usage could differ wildly between countries, with participants in France and Italy more opposed to convenience cooking tools, such as bread makers and microwaves, than Germany and, particularly, the UK.

For Panasonic, which sells appliances such as microwaves, this made the French and Italian markets more challenging to sell to and design items for, and, therefore, less of a lucrative target in this product area.

“The French and Italian cultures of cooking are so much engrained in their DNA,” says Hanson, head of insight and innovation. “Certain cultures cook a lot more than other cultures, and that makes it more difficult from a product-development view.”

In addition, the research has helped the company to understand changes in food and cooking habits during the cost-of-living crisis and following the onset of the Covid-19 pandemic. This, in turn, has helped the UK team to adapt its communication strategies accordingly, and directed resources into developing products for each market and talking to the right consumers on the most suitable platforms.



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Reading the room

Research is at the centre of BookTrust's plans to get children reading, by placing a firm focus on understanding family life. Katie McQuater speaks to Ruthann Hughes to find out more about the charity's approach to learning

For an organisation that promotes the benefits of reading, it's perhaps not surprising that learning and curiosity are at the heart of BookTrust's approach.

The charity has a strategic commitment to behaviour change: getting a generation of children reading across England, Wales and Northern Ireland through programmes that provide families with books, resources and advice to encourage parents and carers to read with their children.

Such a significant goal requires dedication to evidence: producing it, gathering it, analysing it and acting on it.

Learning, evidence and insights are very much a cross-organisational endeavour within BookTrust, says Ruthann Hughes, director of research and impact at the charity. Having an evidence-led way of working requires learning to be happening in quite a big cross-functional organisation, so it's very much a shared endeavour.

While the research and impact team contributes significantly to this, it works closely with other teams within the organisation. This shared endeavour involves collaboration with, for example, a design and innovation team and a partnership team that works on the ground with families to deliver resources and inspire children with their reading. Data, insights and evidence filter into almost everything BookTrust does, because it has set itself up to do social innovation in a really structured way, says Hughes. When it comes to learning, we are firing on all cylinders because it's in everything we're doing.

From ethnography to understand how it can help foster reading habits within families, to identifying strategic opportunities, testing ideas, evaluating pilots and feeding insights back into organisational planning, the organisation conducts a significant volume of research all of which is carefully curated to ensure it will feed into its key strategic priorities.

Supporting this is what Hughes terms a jigsaw of learning of which the research and impact team is part. In the past three years, the team has grown from three researchers to nine today. A mixed

methods team, it comprises various skills and areas of expertise: theory of change, monitoring learning, and deliberative engagement being a few.

Hughes says the varied skill sets complement those of others within BookTrust.

Making reading happen

In 2021, BookTrust set out a new five-year strategy outlining how it would support families to adopt or change behaviours that help them to create and cultivate a reading habit. In the charity's own words, this was a 'new and ambitious direction' and it now uses a 'theory of change' COMEB behaviour model to guide and inform its work, based on extensive internal and external evidence.

The research and impact team carries out a large amount of work focused on data, insight and evidence on what is required to establish the reading habits that the organisation is working to create. This includes reviewing external evidence on the various outcomes the organisation needs to meet to contribute to sustained behaviour change. 'A complex theory of change approach requires a lot of analysis and synthesis of external evidence,' says Hughes.

Research priorities are formed from the organisation's strategic priorities, and encouraging shared reading in the early years of life is a core focus of its work, because of a body of evidence showing the positive impacts of reading at an early age. Hughes explains: 'We know that if we can crack reading behaviours in the early years, children are much more likely to continue reading through childhood and into adult life and therefore go on to experience the multiple, transformative, long-term benefits of reading.'

Interventions by the charity in the early years space include Bookstart Baby, a programme where every child aged up to 12 months is eligible for a free pack of books and resources.

'We want to get children reading so that they can go on to enjoy better wellbeing, better parental child bonding, better school readiness and outcomes through school,' says Hughes. 'Later in life, wellbeing is affected by reading. Reading

has a really positive contribution to improving life outcomes generally, particularly for disadvantaged families.'

While the organisation wants all children to have access to reading, it also runs more targeted programmes aimed specifically at low-income families and children in care, for example. It is currently developing more targeted interventions focused on low-income families, designed for children from birth to five, with research informing the design of interventions. 'We're trying to build up the moments where families are supported in their reading journeys through BookTrust,' says Hughes.

The organisation's BookStart Preschool and BookStart Toddler early years targeted offers aim to support low-income families with shared reading, and BookTrust has distributed packs to 425,000 families through more than 5,000 early years settings, alongside 'Storyteller' resources for early years practitioners, with evidence from co-design activities informing the design of the programmes.

For example, families and practitioners told the researchers that the bonding moments between a child and an adult sharing a book are important. Parents and carers were motivated by the positive feelings they experience in these moments and seeing their children's responses. BookTrust took this on board and designed its books and resources in

these packs to foster positive interactions between parents and carers and young children, with an emphasis on play.

Additionally, the organisation's Family Survey found a lack of confidence among target audience families. For some, reading was associated with negative experiences at school for example, with some saying that the word 'book' brought back unhappy memories of lessons. BookTrust developed its resources and messages accordingly to communicate that there is no right or wrong way to share a story and that shared reading can happen anywhere. It is also developing tools to help build parental confidence.

Exploring new territories

One of the ways in which BookTrust is expanding its understanding of how reading can work in families lives in a way that's going to help is ethnographic work involving digital contributions from participants via video calls and diaries.

Through this research, the organisation is exploring 'new territories' to help it aid families in their reading, explains Hughes. 'Some low-income families have particular challenges around time and access to activities and resources and we want to be there for these families, so we are trying to learn with them about how we can help.' It has been working with innovation consultancy Untapped to



“It’s fundamental to listen to the voices of the families that we are seeking to support”

devise a methodology focused on deep conversations and understanding the granularity of everyday life. Hughes says:

There are methodological challenges that come with conducting research with seldom heard groups. Hughes explains: “Within our target audience, accessing at scale the kinds of families we’re trying to support, and getting their involvement in research, is an ongoing endeavour.

“This is wider than just our organisation. I think there’s definitely a challenge around representation of low-income families in panel work.”

Additionally, while pointing to the really big benefits of the opportunities created by online research, Hughes highlights another challenge in this area, not unique to BookTrust, that can cause a barrier for participants – that of internet and device accessibility.

“Where we are working with low-income families, there’s the ongoing challenge of how you make sure that those families are properly able to contribute to learning, because there are challenges around access to data, as well as device ownership. There are issues around families sharing one smartphone, and therefore we need to be thinking about how we plan for that.”

Measuring at scale

At the other end of the spectrum, quantitative research, including the BookTrust Family Survey, a national study of low-income families that involved 2,150 families last year, is important to help the organisation measure at scale.

“For us as an organisation, it’s fundamental to listen to the voices of the families that we are seeking to support, so being able to do that at a national level with that number of low-income families is really important to us and remains an ongoing focus,” says Hughes.

Insights from the survey will be shared outside BookTrust with the aim of

contributing to wider conversations about development in the early years. And internally, findings from the research are underpinning various strategic decisions.

For example, research informed the development of the Storytime programme, offering story sessions for young children in 2,000 libraries. At the point of scoping it out, the organisation drew on a finding from the Family Survey that almost half (47%) of low-income families are not registered with a library. Additionally, qual and co-design work highlighted that libraries were not necessarily viewed as places to visit with young children – for example, some families said that they viewed libraries as places where children are expected to sit down quietly and listen, and this deterred them from attending.

As well as using research with families to shape the development of the Storytime pilot, the organisation drew on insight from library staff to develop tools aimed at supporting libraries, particularly to engage new families and work with local community organisations. Continued research with libraries, including feedback surveys, is used to evaluate what’s working.

Elsewhere, BookTrust’s Letterbox Survey this year received 350 responses from children in foster care, sharing their feedback on the long-running Letterbox Club, a programme that delivers age-appropriate book parcels to children within the care system. Hughes says: “It’s an old-school paper survey that we feel is important for the audience we’re researching here.”

The organisation is also embarking on its first longitudinal study, working with a cohort of families from the start of family life – birth onwards – to understand how reading behaviours formulate in families and the role of BookTrust within this.

Across the various research activities, there is not one standout approach when



it comes to methodology. A mixed approach is key, according to Hughes. “It’s about having the awareness of and ability to flex and use different methodologies and to learn as we go.

“As an organisation, we’re learning – but we’re also learning about the learning. Continuous improvement applies also to the way we structure and approach our learning activities with families and practitioners and we are always listening to feedback.”

This listening extends to business planning. The research and impact team creates opportunities in the planning cycle to review current and recent evidence so that the organisation is continuously building its understanding of what works and what doesn’t. This involves a lot of sharing with different parts of the charity, with cross-functional



teams set up to focus on specific goals – for example, one team focuses on working with vulnerable people.

Speaking with Hughes, there is a sense that no opportunities are wasted, with the organisation looking to put every bit of evidence it gathers towards that ultimate, overarching goal.

But of course, changing habits doesn't come quickly – in bookish terms, it might be more akin to absorbing yourself in a lengthy classic rather than a digestible holiday page-turner.

"The biggest challenge is that we know that behaviour change is complex, takes time, and requires a breadth of activities," says Hughes. "It's not an easy win and we wouldn't expect it to be. It requires a really structured, thoughtful approach to learning and innovation."

Representation matters

BookTrust recently worked with Dr Melanie Ramdarshan Bold, a senior lecturer and associate professor in children's and young adult literature studies at the University of Glasgow, to share her report on the representation and experiences of people of colour among children's book creators in the UK.

The organisation has been tracking the proportion of creatives – authors and illustrators of colour – in UK children's publishing since 2017. "In summary, we have found there has been strong progress over the past five years but there is still further to go on representation of creators of colour and there is further to go in representation of children and children's lives that are as diverse as the UK population is," says Ruthann Hughes, director of research and impact at BookTrust.

The organisation is also exploring what books and resources to share with families, considering representation of different family structures, different socioeconomic backgrounds and different geographies within children's literature, according to Hughes.

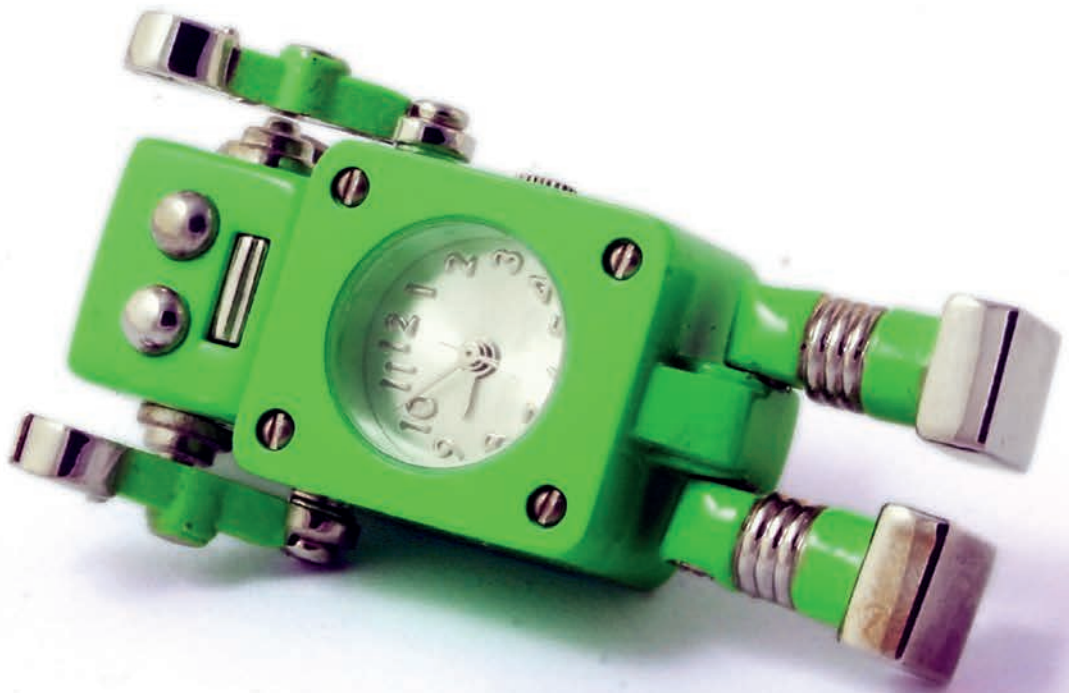
The BookTrust Represents initiative introduces children to new texts in schools, supporting authors and illustrators of colour to engage with students through virtual and in-person events.

An evaluation report for the programme, based on the experiences of teachers, pupils and authors, found that representation in children's books has a critical impact on children's wider learning and development in the classroom and beyond, and that author visits and use of diverse and inclusive books in schools had a positive impact on children's engagement with books and their own motivation to read and write their own stories, as well as developing their future aspirations.



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Finding patterns



There are some facts and figures about our current context that should give us pause for thought. Some are simply stranger than fiction, while others are connecting the dots and seeing patterns in the myriad events constantly unfolding around us.

1 Roaring Twenties déjà vu?

The first world war of 1914-18 was followed by the Spanish flu in 1920. Fast-forward 100 years, and the Covid-19 pandemic of 2020-22 was followed by Russia's invasion of Ukraine. Indeed, former UK Prime Minister Boris Johnson dropped the country's Covid-19 restrictions on 24 February 2022, the very day of the invasion.

2 Stability of UK government finances shaken

The 30th anniversary of Black Wednesday and the UK's historic ejection from the exchange rate mechanism (ERM) was on 16 September 1992. Pound sterling plunged to a 51-year low of £1/\$1.03 against the US dollar on 23 September 2022, exactly 30 years and a week to the day later.

3 Like Halley's Comet, royal pomp and global ceremony come round every 10 years

Royal jubilees have coincided with major global events that have turned the whole world's attention onto Britain. The late Queen's Diamond Jubilee of June 2012 preceded the August 2012 Olympic Games, while the Platinum Jubilee of June 2022 was followed in September 2022 by HM Queen Elizabeth II's funeral.

4 What's in a name?

Sometimes, a name lives up to its connotations. For example, in the case of Made.com, it was unmade by supply-chain disruption and falling consumer demand, and fell into administration.

5 Big Bang 1986, Big Bang 2.0?

According to City suits, after the Big Bang in 1986, the toffs became bankers doing the wining and dining, while the

barrow boys became traders doing the wheeling and dealing. Shortlived Prime Minister Liz Truss and her Chancellor, Kwasi Kwarteng, were due to unleash Big Bang 2.0, a bonfire of the regulations, in 2022, but blew themselves up by going too far and too fast.

6 UK for sale, bidders turning up like London buses

With a slump in the stock market, potential and actual bidders are seemingly lining up to take over UK technology companies. Avast, Darktrace, Aveva, Micro Focus, and GB Group have all had preliminary approaches or full takeover offers. All the bidders appear to be arriving at once, like London buses. Hurry, hurry, while stocks last!

7 Did any currency outperform the mighty dollar in 2022?

Why, the Russian rouble did! They had the black stuff everyone was desperate to get hold of to avoid a white-knuckle ride of winter blackouts. But being the world's leading economy and self-sufficient in energy has its virtues, and the US dollar ruled supreme against all other currencies.

8 Travel and transport must be down now everyone's working from home?

Wrong. Train and airline passenger traffic was back up in 2022, to 95% of 2019 levels. Human beings are social animals and the call of the wild is irresistible.

History repeating itself, recognising facts stranger than fiction, and connecting the dots to make sense of a changing world around us - all give us the confidence to make informed judgements and take calculated risks.

As Steve Jobs stated in his Stanford commencement speech in June 2005: "You can't connect the dots looking forward; you can only connect them looking backwards. So, you have to trust that the dots will somehow connect... This approach has never let me down, and it has made all the difference in my life."

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A private life

Data privacy is one of the major issues of the modern age. Research from the BBC has explored how personal data stores could be used to give people back control. By Liam Kay

Everything you do, type, see, buy, watch or listen to online creates data. Despite its importance to organisations worldwide, it is widely believed that, in this hi-tech age we, as humans, have limited control over the data we create.

But what if you had a tool that allowed you to decide who has access to your information and gave you ownership over your personal details, even down to your consumer spending patterns or carbon footprint?

A personal data store (PDS) is an attempt to rectify the lack of data privacy online. It is a fledgling idea for a service that allows an individual to store, manage and use their personal data in a highly secure and structured way, as well as controlling who can access

that information. This could mean sharing details with a mortgage provider for the duration of a mortgage application, for example, and then choosing to remove access later. It could also include analysing and even selling your own personal data.

The BBC is one organisation that has shown interest in the idea of a PDS, and it began toying with the concept three years ago.

We all knew large organisations were exploiting personal data for their own good, says Eleni Sharp, head of product at BBC Research & Development. We felt the BBC had an opportunity to do things differently. We thought let us put focused energy into personal data stores, do some technical trials, look at what audiences think, and then feed our recommendations back into the BBC and the industry as a whole.

The BBC developed a prototype of a PDS that allowed users to view and analyse their data in several areas, including: viewing and listening habits; financial behaviour; carbon emissions; and health and fitness. Users could explore the data held, but the prototype did not allow them control over who could or could not access the information at this early stage in development.

To explore the case of pursuing a PDS, and to help understand public attitudes to the concept, the BBC appointed Savanta to conduct research on the issue. The Savanta research incorporated expert interviews with five data protection specialists, followed by cognitive testing with 12 pairs of 16 to 25 year old friends. A quantitative phase came next, consisting of a 15 minute online survey with 1,000 16 to 35 year olds and a further 500 36 to 55 year olds, about managing personal data online.

The final part was a 10 day online community, interspersed with focus groups involving online community participants and a live trial of the PDS using BBC and Spotify data.

The young people who took part in the research were attracted to the idea of a PDS, according to Anna Parker, consultant at Savanta. The hook, initially, was the aspect of control, but when they saw it, they really liked being able to see their data come to life and be in one place, she says. They wanted oversight and control. They wanted to see who collects, uses and shares their data, and revoke access.

Sharp adds: Young people were so clued up about their data; they wanted to be in control of it, but they felt quite helpless. That was empowering, as there's a real audience need.

Areas such as health and finance were the most popular elements for users of the prototype PDS, allowing them to keep tabs on spending or exercise. A feature that measured and kept track of people's carbon footprint, allowing them to see where improvements could be made, was also viewed favourably. In all, 70% of respondents in the quantitative survey said they knew how a PDS worked, with 68% of under 35s open to using one.

Data security, however, was seen as an issue by research participants, especially with the BBC being better known for television and radio than cutting edge technology. However, respondents said they trusted the BBC as an institution and would consider using a PDS designed and run by the organisation.

The PDS wouldn't hold your NHS data. You wouldn't put it in. The PDS would access it, explains Josephine Hansom, managing director, youth, at Savanta. The BBC wouldn't see any of it. Addressing the comprehension of things like that is the crux of whether you are going to be able to deliver the PDS.

One part of the PDS that did not and was the media section, says Sharp, which was a crucial area to get right if the BBC was to consider taking the PDS forward. The prototype allowed Spotify, Amazon, BBC Sounds and iPlayer data to be analysed, but proved less popular than other features. For us to get any traction with this technology within the BBC, we had to nail what the media proposition

would be, Sharp explains. That helped us home in on what we wanted to do next and come up with the idea of the watch party.

The watch party is an ongoing project between BBC Together and Data Pod, run with world wide web founder Sir Tim Berners-Lee, that allows people to watch BBC shows with friends and family on a laptop or desktop, and then access data on their viewing habits.

The BBC is also working with other organisations exploring this technology, such as NHS England and the Ministry of Justice, to exchange knowledge and work on shared challenges.

Sharp says the project has been a success so far, with a lot of repeat visitors, and shows the potential for a PDS to work in the future.

It is only a first step, but the prototype is getting people to see their data and think what they want to do with it, she adds. We have framed this well and it shows that, technically, we can do it. The BBC totally should be doing this on behalf of all UK citizens.

●

“The hook was the aspect of control, but... people really liked being able to see their data come to life and be in one place”

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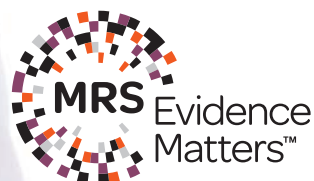
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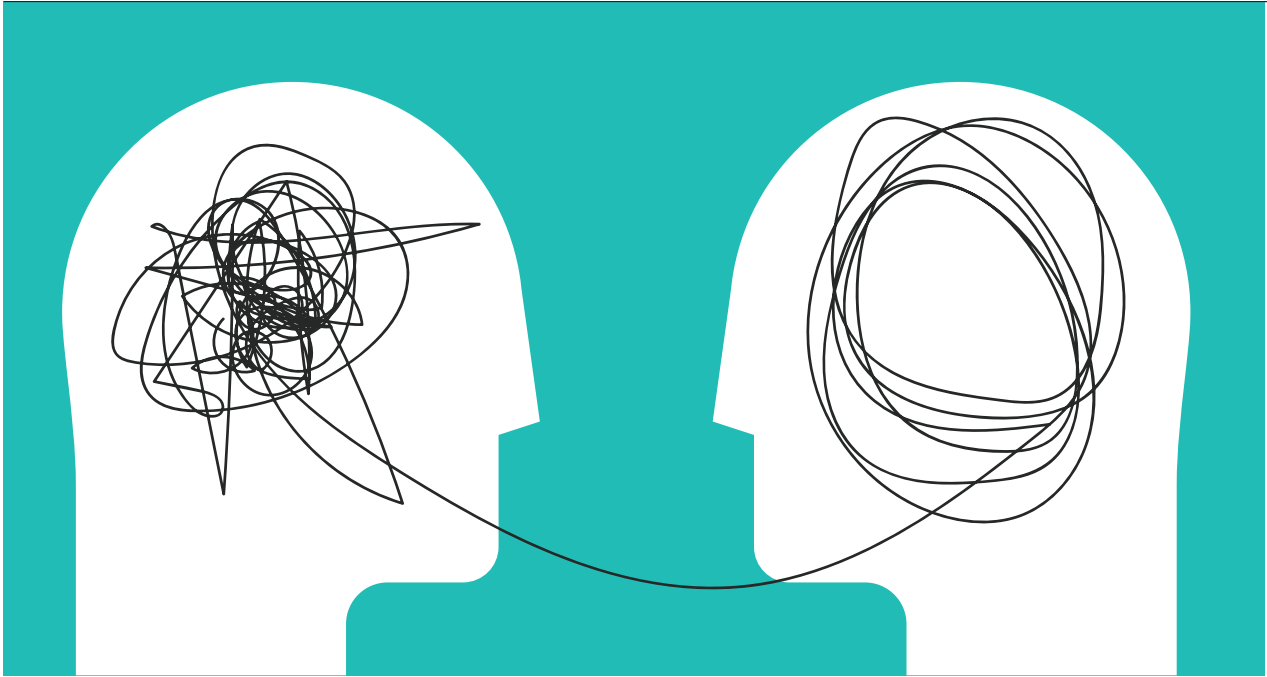


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Minding your business

In 2020, Firefish Group became the first research agency to sign the Mindful Business Charter. Margot Goldman-Edwards and Sian Stranks share how the process has been going

It has been almost three years since our group became a signatory of the Mindful Business Charter (MBC), with the intention of creating a working environment that removes unnecessary stress and allows everyone to thrive.

The journey hasn't come without its challenges, but it has given us a framework to not just talk about mentally healthy working practices, but to create tangible actions across our businesses.

Our chief executive, Jem Fawcus, initially heard about the MBC and felt it was an important initiative to be part of. The MBC was set up in response to the demands of professional service work and the nature of the client/supplier relationship. As we explored the framework and the challenges it was trying to overcome, we felt we could draw significant parallels with the organisations that had signed up to the charter.

So we started our journey with the MBC – the first organisation from the market research sector to do so. We welcomed the chance to meet regularly with other industries, and learn from – and be inspired by – what they were doing in this area.

After our initial onboarding, we set up a small team responsible for developing principles and actions that we felt would be relevant for our business, under the guidance of the four pillars of the charter (see boxout).

Pinpointing pressures

Our journey started, primarily, in our Firefish UK business. We spent time with teams to hear about how they defined moments of stress in their day-to-day work and looked at what we already had in place to alleviate these. Our first action was to communicate our existing wellbeing principles to the business more proactively, through the guidance of the pillars.

Speaking to people and trying to understand their pressures highlighted that some of the messages around our current wellbeing principles had been lost or went unnoticed in practice and we needed to do more to ensure that everyone knew about them. For example, we reiterated the importance of:

- Switching off work channels when on annual leave
- Being aware of other people's workstreams
- Aiming to start an hour later after a late night of fieldwork.

These are things we have committed to and that have been endorsed at senior level – but they were not consistently actioned.

We then started to think about actions we could take to go further under the principles. When we became a signatory, we were in the middle of an unprecedented global pandemic and had adopted new, remote ways of working. We were conscious that there was a new stress emerging from feeling distant from colleagues, peers and seniors, but with the added realisation that people were experiencing the pressures differently depending on their personal circumstances. We needed to develop principles that would be relevant in the moment, but not reactive. We wanted to be progressive in our approach to mentally healthy working and for the principles to have longevity and flexibility – to still be relevant in the future ways of working that were yet to be established.

We developed some practical principles and communicated these across the business. Under the ‘smart meetings and communications’ pillar, for example, we recognised the reliance we were having on video calls and virtual meetings – and our insight highlighted that this could be stressful for individuals in different ways. We developed principles on how people could share their communication preferences with others, giving people permission to turn off cameras for a screen break, and encouraging them to think more about who needs to be on emails/invites and to trial times of the day when they stay off email to complete tasks.

Remote working also added pressure on how and when people took breaks. Not having natural breaks away from screens that the office environment provided, we developed principles around rest periods, encouraged people to signal their working hours via their email signature, and changed some of our regularly scheduled meetings so people didn’t have to compromise their lunch break to attend. We also ensured that seniors across the business led by example.

Our journey has not progressed without challenges. Our company comprises different businesses, and the work culture between teams can differ – what works for one team might not work for another. This has led us to realise that, while some principles will sit company-wide, for others we will need to be flexible or create principles to suit a particular business. We established a team of MBC representatives across different parts of the group, so we can account for all business needs and learn from one another.

We also felt it was important that we had representation at board level and embedded help from the central people team, to understand where our principles can be supported through other company wellbeing initiatives, such as: a group mental health policy; menopause policy; mentally healthy training for line managers; and trained mental health first aiders.

Maintaining momentum

We continue to overcome the challenge of building awareness and keeping up momentum, to ensure everyone knows of our commitment to MBC and what that means for them. It is important to keep the company updated on progress, to ensure it remains at the forefront of people’s minds and that they feel comfortable making suggestions and helping us evolve the principles. Our MBC representatives work together on a regular basis to establish new principles and further those we already have.

We have also launched a new slide for research proposals, which outlines our values around mental health and wellbeing. We hope it will help set expectations with our clients about what’s important to us, and how we work.

● **Margot Goldman-Edwards is associate director, and Sian Stranks, people and development director, at Firefish**

The pillars of mindful business

By signing the Mindful Business Charter, organisations make four commitments in the following areas:

- Openness and respect – building trust and effective communication
- Smart meetings and communications – adhering to smart meeting and communication guidance
- Respecting rest periods – consideration given to the need to ‘switch off’
- Mindful delegation – implementing a best-practice approach to collaboration, instruction and delegation.

Find out more about the Mindful Business Charter and read the full set of commitments at www.mindfulbusinesscharter.com



From micro to macro

Behavioural science is starting to tackle the big macro challenges as well as micro ones. In the early years, behavioural scientists looked for quick wins for proof of concept. For instance, the UK's Behavioural Insights Team was set up with a two-year sunset clause, which required them to achieve at least a tenfold rate of return on the cost of the team. In reality, it achieved more than £300m of gains by focusing on small, inexpensive changes that had significant impacts on decision-making and behaviour.

Part of what growing up is about, however, is realising that the power we have unlocked can also tackle bigger challenges, even the looming existential problems facing us. With the permacrisis intensifying, behavioural science is becoming an essential tool in any major organisation of the future – be it governments, global corporations or social activism – to help solve some of the biggest challenges of our generation. Several applied behavioural scientists, including Dan Ariely and Kelly Peters, have recently stepped up to face these challenges. Ariely wrote in his blog in December 2022: “I still think that social science has a large role to play in improving our personal lives, but I think that other important topics have emerged and many of these are more pressing. When I look at the world now, with the climate crisis, fake news and political fragmentation, my view is that our priorities should be different, and so is the role of social science.

“Over the past two decades or so, we have done a lot to get people to think about principles from social science in terms of our personal lives, and we now need to turn our attention to these larger challenges ahead of us.”

Peters sold her consultancy, BEworks, to the Kyu Collective and has founded Trial Run, a product-innovation company to harness the power of behavioural science, with blockchain technologies to help companies drive their sustainability goals.

How to live in these adult years

- Appreciate and celebrate the breadth of behavioural science in its applicability to both the micro and the macro challenges we face; the small tweaks that make a frustrating consumer journey a satisfying one, to tackling the critical issues that people are facing today, such as complex health problems, living more sustainably, and, right now, coping with the cost-of-living crisis.
- Thoroughly research the context to understand what's driving current behaviour, recognising the roles of culture and emotion.
- There is no one size fits all. Look for, anticipate and enjoy variation in the impact of a behavioural intervention, then dig deeper and try to understand that variation.

¹ Bryan, C J, Tipton, E & Yeager, D S, 'Behavioural science is unlikely to change the world without a heterogeneity revolution'; *Nat Hum Behav* 5, 980–989 (2021).



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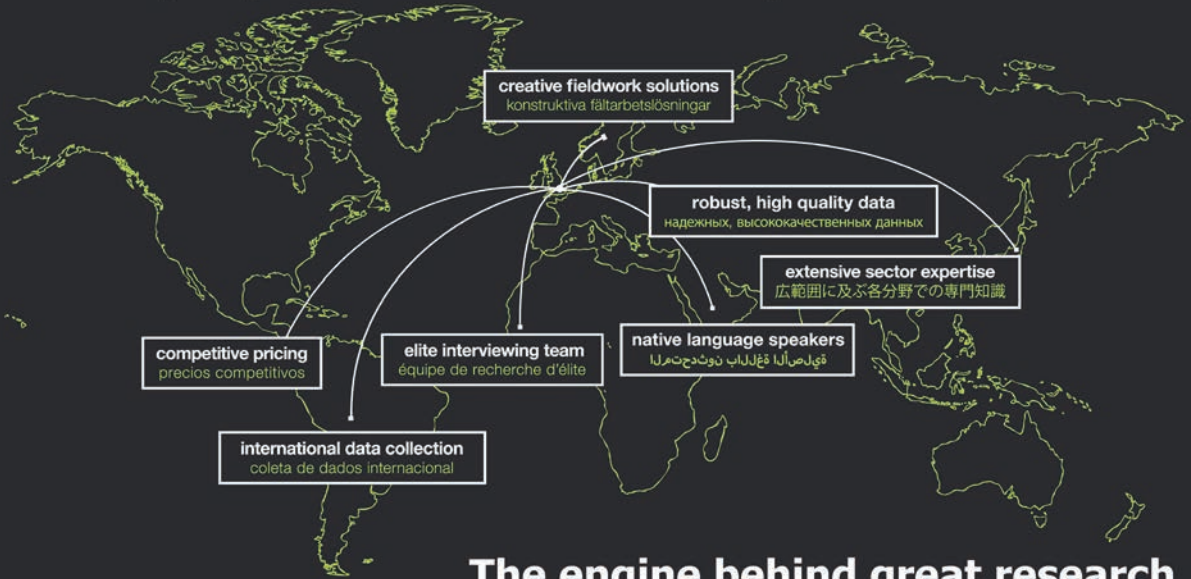


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Safety matters



The resumption of in-home, face-to-face data collection post-pandemic has led to many queries to the MRS Codeline advisory service concerning personal safety.

There are several dimensions to the risk that researchers may face when involved in close social interaction:

- Risk of physical threat or abuse
- Risk of psychological trauma, as a result of actual or threatened violence or the nature of what is disclosed during the interaction
- Risk of being in a compromising situation, in which there might be accusations of improper behaviour
- Increased exposure to risks of everyday life and social interaction, such as road accidents and infectious illness
- Risk of causing psychological or physical harm to others.

Budgeting for safety

All research proposals and funding agreements should include the costs of ensuring the safety of researchers working on the project. It may be helpful to distinguish infrastructure costs that are apportioned to all projects from costs particular to the project.

Infrastructure costs might cover training on risk assessment, communication aids, personal or vehicle insurance cover, a named member of staff responsible for fieldwork safety, or staffing a fieldwork contact point. It is important to clarify which of these costs fall to the employer and which are to be borne by the funder.

Project costs might include extra fieldwork time (working in pairs, providing a 'shadow' or reporting back to base), taxis or hired cars, appropriate overnight accommodation, special training, and counselling for staff researching sensitive topics.

Planning for safety in research design

Researcher safety can be built into the design of proposals.

- Choice of methods – include safety in the balance when weighing up methods to answer the research questions
- Choice of interview site – consider whether home interviews are necessary for the research
- Staffing – consider designs where it is possible to use pairs of researchers to conduct an interview, or to interview two members of the household simultaneously
- Choice of researchers – consider whether the research topic requires the recruitment of researchers with particular attributes or experience

- Recruitment methods – where possible, design methods of recruitment to allow for prior telephone contact
- Time-tabling – take account of the tiring effects of spells of intensive fieldwork. A more relaxed schedule may mean that researchers are more alert to risk and better able to handle incidents.

Assessing risk in the fieldwork site

Once the fieldwork site has been selected, try to reconnoitre the area before fieldwork starts. Questions to ask include:

- Is there reliable local public transport?
- Are reputable taxi firms easy to access?
- Is it safe to use private cars and leave them in the area?
- Is there a local rendezvous or contact point for researchers?
- Are there appropriately priced and comfortable hotels within easy reach?

Risk and research participants

The topics for discussion in many social research interviews – for example, poverty, unemployment, relationship breakdown, social exclusion, bereavement and ill health – may provoke strong feelings in participants and prompt angry reactions.

Some participants may present a greater possibility of risk than others. Some research involves people who have a history of psychological disturbance or violent behaviour. If such characteristics are known in advance, the researcher and supervisor should be as fully briefed as possible on the risks involved and understand the precautions they need to undertake.

Personal safety when interviewing

Do not appear aggressive or annoyed if an interviewee is late or says they must leave early. Respect their wishes. You are taking up their time. Consider whether your interviewees might have expectations that you will give them something in return for their cooperation.

Where questions might be sensitive, trial your questions where possible with someone you trust who is aware of the context. Familiarise yourself with any culture sensitivities.

Never start an interview with someone who appears to be under the influence of alcohol or drugs, or where the interviewee or any other person present is in a disturbed, charged, or emotional state. If the interviewee becomes upset during the interview, offer



them the opportunity to take some time to compose themselves before continuing.

Interview precautions

Assess the situation before beginning the interview and, if in doubt, rearrange it for when a colleague can be present. Carry an alarm or other device to attract attention in an emergency and let the interviewee know that you have a schedule, and that others know where you are.

Always carry identification, a badge or a card, authenticated by the head of the research organisation and giving the researcher's work address and telephone number.

Maintaining contact

Details of the researcher's itinerary and appointment times – including names, addresses and telephone numbers of people being interviewed or called, and accommodation details – should be left with a designated person at the office base or a temporary fieldwork base (taking care with interviewee confidentiality).

Fieldworkers should carry mobile phones so that the base can contact them. Where more than one researcher is working on the site, they should meet or communicate by mobile phone at pre-arranged times. If such an arrangement is not kept, the other researcher should inform the responsible person at base.

Strategies for handling risk situations

Employers should ensure that researchers are trained in techniques for handling threats, abuse or compromising situations, and research managers could consider ways of refreshing their knowledge. External trainers may be useful, both for initial training and in keeping the issue live.

Researchers should also be prepared to deal with the effects of the interview on participants and be ready to spot signs that the participant is becoming upset or angry. Often, the researchers' training means that strong feelings of this kind can be acknowledged and contained, but there may be occasions when it is more sensible to end the discussion and leave.

●
“Safety issues should feature in the training of all new research staff, and guidelines should be included in induction packs and handbooks”
 ●

Making guidelines stick

Ways of making guidelines stick will include awareness raising among both new and experienced staff.

Safety issues should feature in the training of all new research staff, and guidelines should be included in induction packs and staff handbooks. There is a need for continual reminders and reinforcement throughout a researcher's career.

Supervisors and research managers may need to take staff through procedures with each new fieldwork period, while support staff responsible for setting up fieldwork arrangements should also be trained in the procedures.



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Being a people-first employer

There's a lot of talk of new ways of working, and while various formulas and research findings are still being chewed over, one thing is clear: ensuring your company is an inclusive, flexible and nourishing environment is no longer a nice-to-have.

I'd like to draw your attention to two important streams of work that address these issues head on. First, new guidance from MRS on how to support your staff and business through the cost-of-living crisis and inflationary pressures (see box opposite).

This provides companies with a far-reaching list of options that will help to support employees through this difficult period – covering topics such as financial reimbursements, employee benefits, staff communications, working culture, policy, and accessibility.

Second, you will be invited to share with staff a new employee survey that is part of our People and Talent initiative. All data will be collected and aggregated by MRS, and each participating research

organisation will receive the aggregated results from their staff, together with the total aggregated data. This will enable businesses to benchmark their staff performance compared with the aggregated results from across the sector.

MRS will be producing some 'top fives' of those organisations that are performing particularly well in each of the various areas (engagement, culture, and so on).

We intend that the survey results will also be used as secondary evidence for those organisations that wish to enter the MRS award for Best Place to Work. This will not come into effect until after MRS Awards 2023.

There will never be a one-size-fits-all approach to creating the perfect work environment; life is too messy and, thankfully, people are unique. But these two initiatives will give you, the employers – or HR departments and line managers – the tools to align the business with being as people-centric on the inside as you strive to be on the outside.

Sector and MRS news

Cost-of-living guidance

The cost-of-living and inflationary crisis is affecting individuals and businesses across the world, including the research sector. MRS has produced new guidance, *Cost of living and inflationary pressures: how best to support your staff and business, to review different ways in which businesses can support staff. Not all the options are financial: communication, policies, working culture and accessibility can all help.* Download the guide at www.mrs.org.uk/topic/shortages-of-talent

Latest MRSpride podcast

The latest MRSpride podcast features John Bizzell, on why he co-founded MRSpride in 2018 and how far the sector has come on inclusivity and LGBTQ+ issues since then. Hear the story on OUTsights on the MRSpride section of www.mrs.org.uk

Making the most of your membership

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

Mentoring Scheme



Grow professionally with our specialist Mentoring Scheme

The specialist Mentoring Scheme for members provides you with a framework to develop a broader set of competencies and interpersonal skills. Mentoring can help you review your approaches, reflect on your work, and optimise your thinking. As a member, you can apply to be a part of the Mentoring Scheme. Our personal matching service means that you are matched with an experienced senior professional, a mentor who has faced challenges and experiences. The next application opens in spring 2023.

Professional Webinars



Enjoy live webinars from international experts

As part of your membership, you get access to nine free professional webinars this year – plus for 2023, we have reinstated two in-person speaker evenings, at our London head office. This year's programme focuses on behavioural science, neurodiverse audiences, sustainability, and non-verbal communication. Normally £30, this benefit can save you more than £300 per year and each event is one hour of CPD. Run by international experts, the webinars are an hour long, with a chance to ask questions at the live event.

Research Buyers Guide



The international research supplier directory

The Research Buyers Guide (RBG) is the only source of accredited market and social research organisations in the UK and globally. All featured suppliers employ at least one MRS member in their insight teams, to ensure that research is conducted to the standards laid out in the MRS Code of Conduct. Featuring organisations that have signed up to the Inclusion Pledge and the Net Zero Pledge, the RBG is the definitive guide for clients looking to engage a high-quality research supplier.

Access your benefits

- Sign into your **MyMRS** member account at mrs.org.uk to access all of your benefits
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Diary dates

Training Highlights

Behavioural design

Discover how to apply the latest behavioural science to design experiences, communications and products.

18 April

How to review and refresh your surveys

Learn how to do a robust review of your quantitative survey to better address today's objectives and practical challenges.

18 April

Introduction to Behavioural Economics

In this course, you will learn all about behavioural change and how it effects and improves the chances of commercial success.

19 April

Embedding Diversity within Organisations

This course will support you along your diversity journey, whether you aim to make your workplace more diverse or understand inclusion better.

20 April

Desk Research 2.0

Get the most out of desk research by introducing a range of useful market intelligence sources and learning how to analyse and validate findings.

26 April

Professional webinars and speaker evenings are free for members.

For information on all MRS events go to

www.mrs.org.uk/events



Project Management Masterclass

Interactive exercises to equip you with the tools to run effective projects.

4 May

Professional webinars

Driving the Coutts magic through insight

(Speaker Evening, London)

Hear how Coutts Bank overcame technological, governance and user-level hurdles to gather feedback effectively from its hard-to-reach audience.

20 April

The global impact of breakfast programmes on children's social skills

Stephen Donejgrodzki and Matteo Saltalippi unpack the global research carried out on behalf of the Kellogg Company Fund, to show that school breakfast clubs improve children's health and social skills.

26 April

Neurodiverse audiences: finding brands through a different lens

Tom Richer shares a case study exploring the relationship between neurodiverse consumers and brands, as well as his powerful lived experience of the issues.

11 May

What brands are still getting wrong about sustainability

Discover how can you make the best use of your sustainability initiatives in communications through work carried out by Arla, Lurpak, Cravendale and Borough Market around sustainability.

15 June

What your research department can learn from Hollywood

Lucy Davison shares six crucial communication strategies from her F.A.M.E. model, to help you market and promote your insights to ensure your findings get the attention they deserve.

13 July



Richard Shotton is an author, consultant and trainer, who focuses on applying findings from psychology and behavioural science to marketing. He has written two books, *The Choice Factory* and *The Illusion of Choice*. He began his career in media planning and later founded behaviour science company Astroten

1 Has the prevalence of digital media channels dampened the ability of advertising to persuade us?

Digital tracking makes it easy to measure the short-term impact of advertising. Unfortunately, people place too much emphasis on what is easy to measure and ignore factors that are harder to measure. As the long-term effect of advertising is trickier to pinpoint, this has led to marketers investing in an unbalanced manner – too much demand harvesting, too little demand generation. That’s not the fault of digital; it’s the fault of the industry misusing the medium.

2 Is the media industry concerned with measuring the wrong things?

Yes. For example, it is unduly concerned about the trust crisis. It’s a fiction. Various reports claim trust in brands or ads is in decline. But if you look at the data – even that produced by organisations claiming there is a crisis – you see a different story. Trust in brands is broadly flat.

3 ‘Brand purpose’: essential or irrelevant?

Neither. Purpose seems to be an area where nuance gets lost. Sometimes it’s a useful tactic, sometimes not.

4 Is today’s economic uncertainty conducive to the application of behavioural science?

Yes, it’s more important than ever that we understand and align with how customers tick, so we can continue to

grow – or just survive. A big shift right now is in people’s sensitivity to price. Customers are looking for deals that feel like a bargain. There are some very important behavioural biases that can help brands meet this need. For example, extremeness aversion. This essentially means that consumers, when deciding on a purchase, tend towards the mid-priced option as a proxy for the moderate pathway. The middle seems a sensible compromise: strong enough on quality without too hefty a price tag.

5 What is the most misunderstood behavioural bias?

Social proof. Not because we don’t get what it means – it’s clear that people follow the crowd. It’s more that we could be smarter about how we use the bias.

It’s fine – and effective – to use phrases such as ‘200,000 copies sold’ – but even better to take a more subtle, lateral approach. For example, when Red Bull launched, it filled rubbish bins around London – next to bars, pubs, university campuses, and nightclubs – with empty, crushed Red Bull cans, creating the illusion of popularity. That’s what I would call a lateral application of social proof.

6 Behavioural science is mostly discussed in the brand-to-customer (B2C) context. How else should businesses be applying psychological approaches?

I find it fascinating that we marketers somehow think of business customers as

robotic decision-makers, rather than as human as the rest of us. We’re missing an opportunity if we don’t apply the same psychological biases in B2B as we do in B2C. My favourite demonstration of this is among doctors, who pride themselves on rational evidence-based medical decisions. But a 2018 study by David Olshan, Charles Raeshide and Mitesh Patel, at the Penn Medicine Nudge Unit, shows they are as susceptible to behavioural biases as anyone.

7 If choice is an illusion, what implications does that have for how researchers ask questions and understand customer behaviour?

Consumers might think they are choosing freely, but they can never be aware of all the prompts to which they are implicitly responding, or the context that might be influencing their decisions. So, there’s a limit to what can be gained from asking someone why they chose a certain option; they won’t be able to tell you the whole story.

You need to use mixed-methods research, with a focus on observed data, rather than asking customers to post-rationalise purchase decisions.

Monadic testing is one such method. Split your customer set into groups and show the groups versions of a message with one key difference. Then observe the response, rather than showing multiple versions at once and asking them to choose.

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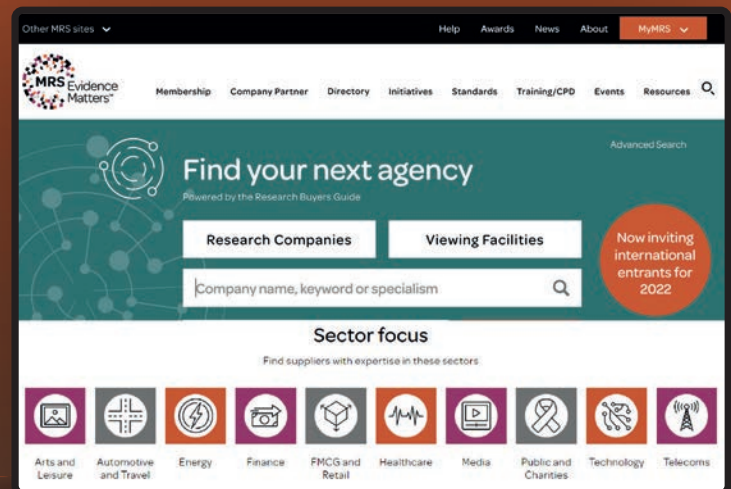
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