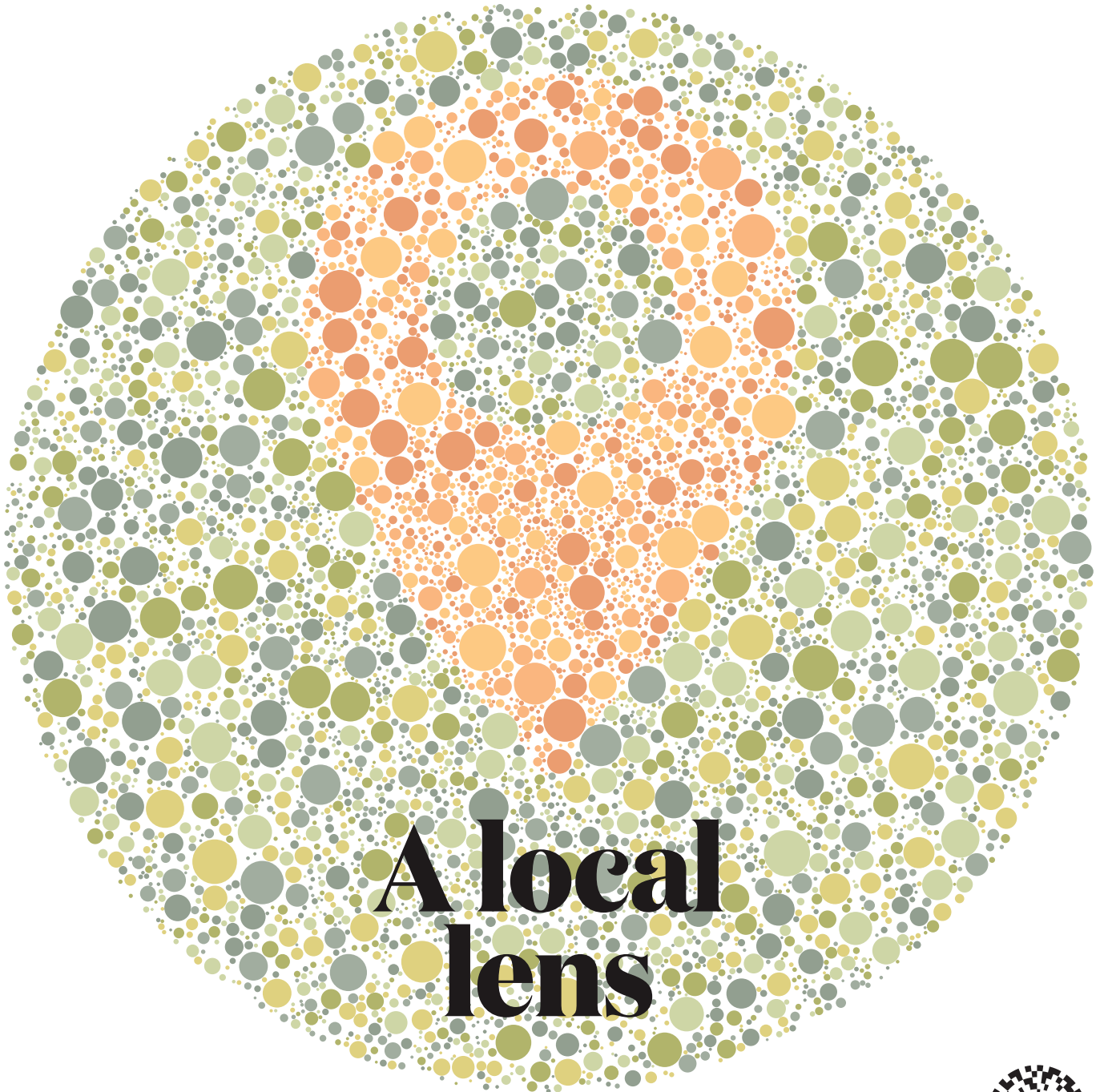


impact

ISSUE 32 JANUARY 2021

Using evidence & insight to make a difference



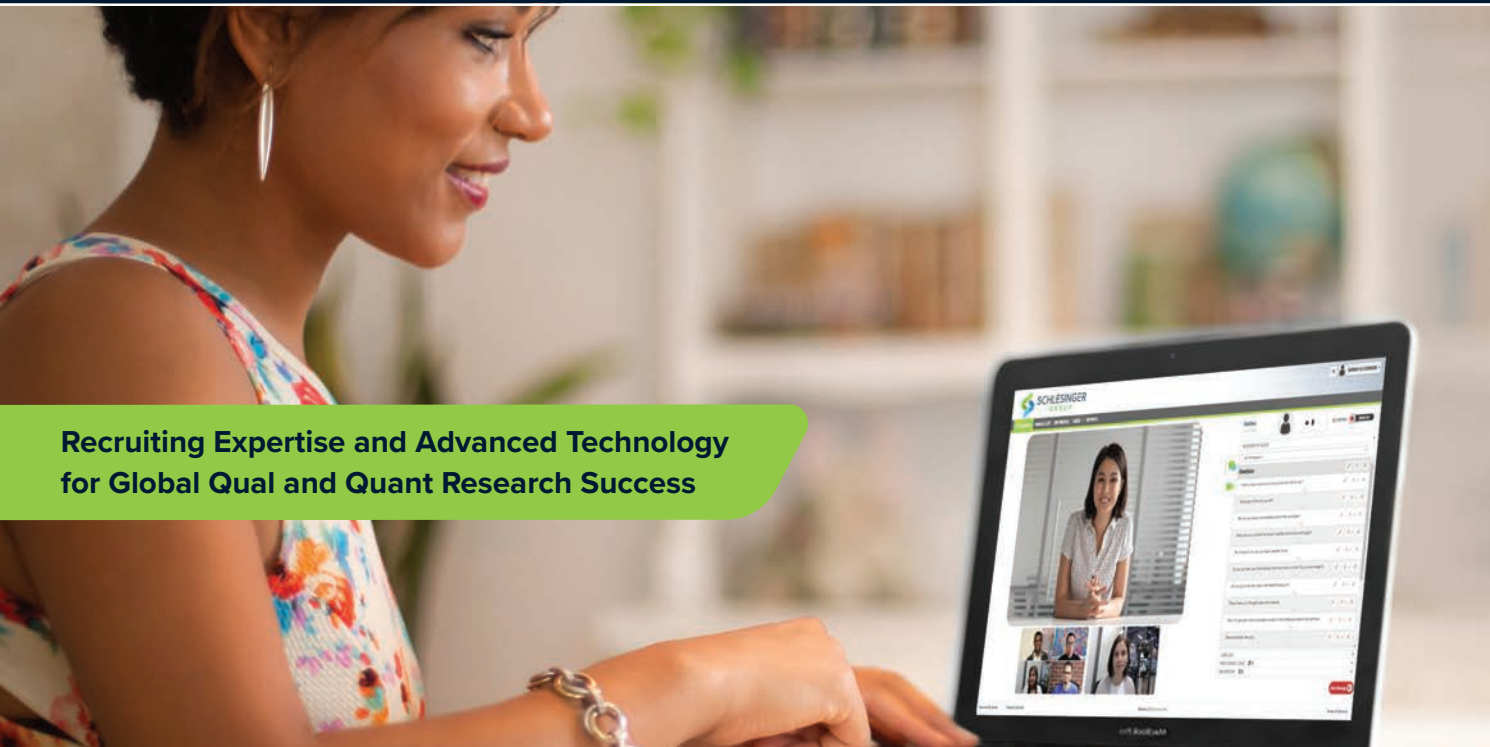
A local lens

Localised research gives the detail needed to paint a nuanced global picture





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Cautious optimism



On Monday 23 November, eight months to the day after restrictions were first implemented, there was a collective sense of relief when the University of Oxford and AstraZeneca Covid-19 vaccine was found to have achieved encouraging levels of efficacy. As we went to print on this first issue of 2021, it felt fitting that there was a feeling of things lightening – if still tentatively.

The world was thrown the biggest of curveballs in 2020. So, while I won't make any bold predictions about what awaits us, I will strike a note of cautious optimism.

Last year was incredibly difficult for many working in insight and data analysis: budget pressures; social distancing restrictions limiting face-to-face research; furloughs; and businesses navigating the complex system of government support. That's before mentioning a gloomy economic outlook and continued uncertainty around leaving the EU.

There have still been reasons for optimism, however. Insight has been at the forefront of guiding effective responses to the pandemic, ensuring organisations take people into account. The recent 2020 MRS Awards ceremony, which 'went virtual' for the first time in its history, highlighted the sector's success stories during this time of significant professional and personal challenges.

The overnight shifts caused by the pandemic served to emphasise the role of quality research in good commercial decision-making, and leaders have seen the value of insight first hand. New methodologies have been embraced – the uptake of online qual being most significant – new businesses have launched despite the wider economic conditions,

and the industry has shifted largely to remote working. We've heard stories of innovative approaches that might not have been considered previously, and researchers responsible for daily briefings with the most senior of stakeholders.

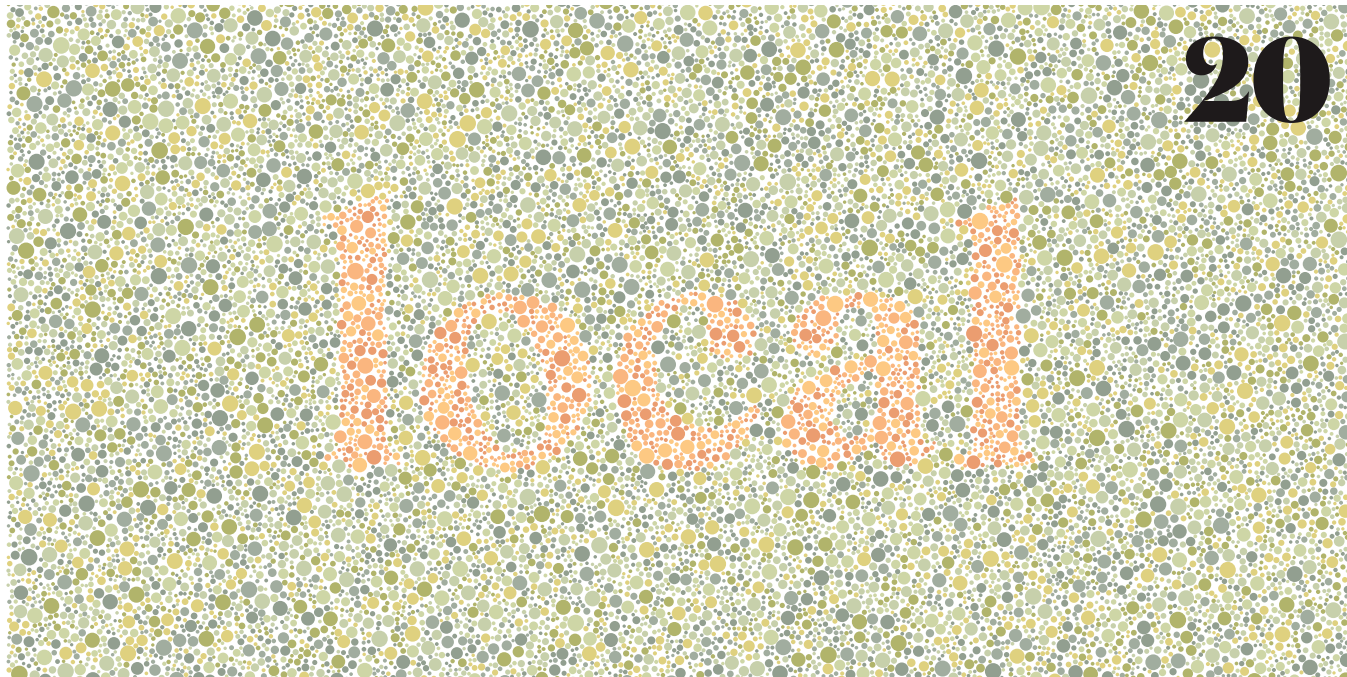
On p20, our report on localised research highlights the importance of global brands tailoring their research programmes to local nuances – this is even more important when it comes to understanding sentiments on seemingly universal issues, such as the Black Lives Matter movement.

Geography isn't the only factor. Our Spotlight feature (p16) explores why it's essential to keep challenging assumptions in research. To do that, we need different perspectives and fresh takes on the world – people from all walks of life and socioeconomic backgrounds.

Societal inequalities were brought into sharper relief in 2020, and new approaches are helping to direct focus towards previously misunderstood or under-represented issues. On p42, for example, we explore how an analysis of unstructured data has been used to understand more about the data gap in women's health.

It's a theme echoed by this issue's In Seven interviewee, national statistician Sir Ian Diamond. With statistics in the public eye more than ever, he reminds us of the power of data to provide the evidence needed to solve some of society's biggest problems.

If 2020 put our weak points and faults under a microscope, 2021 should be the year to examine and challenge them. Now is the time to be optimistic, to think differently and to build. I won't make any predictions, just in case. Whatever is on the horizon, happy new year.



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Instinct vs process



A while ago, creative director Dave Trott was on a creative awards jury. Somebody noticed something a bit strange when totting up the votes. It emerged that while the rest of the jury were voting on each entry by painstakingly awarding marks out of 10, Dave had adopted a binary approach. Anything he thought deserved an award he gave a 10; anything he did not think deserved an award he gave zero. The other jury members argued that it gave him more influence over the winners than anyone else. Dave argued that something either deserved an award or it didn't. End of.

I don't know how the row was resolved, but this story reminded me of the glorious absurdity in procurement-led pitches where the selection panel is required to score pitching agencies using a 'balanced scorecard', based on adding up scores for pre-agreed, weighted criteria. These might include 'chemistry', 'strategic vision' and 'creative execution', and – inevitably, as procurement is behind this process – a fairly hefty weighting for price.

There are a couple of problems with this approach. It would be possible for one person to enjoy disproportionate influence by awarding any agency they did not like zero on all measures. The other problem is that the additive approach does not reflect the instinctive way in which humans make decisions.

That raises a simple question: is human instinct wrong and the process right, or is it the other way around? When I'm asked to explain the difference between Kahneman's 'system one' and 'system two' decision-making, I often mention this process as an example of the distinction. Ultimately, the decision to appoint an agency is a system one decision. System one clearly does not follow the neat mathematical logic of the people who constructed the balanced scorecard. Indeed, if you ask anybody involved in one of these scoring processes (ideally after a couple of drinks) whether they actually follow the process to arrive at their recommendation, they generally laugh. "No, of course I didn't. I decided which agency I wanted to win, then I backfilled the numbers to get the result I wanted."

On reflection, I think their instinctive brains are right to reject this rigidly additive approach. After all, different agency attributes are not additive: they are interdependent, even multiplicative. An agency that is strategically brilliant but creatively useless isn't

half-good – it's arguably worthless. $100+0=100$. But 100×0 is a big fat zero.

This explains why it's important, abstruse as it may seem, to spend a bit of time understanding the debate around 'ergodicity': human fortune, happiness, pleasure, utility, reputation and general growth cannot universally be considered as additive functions, the net sum of different wins and losses. Under multiplicative dynamics, what is optimal behaviour is very different from what is optimal under additive dynamics. Risk aversion suddenly makes much more sense, for one thing – and you do not maximise your fortunes over time by maximising each transaction so much as by minimising downside variance.

If you have $1+3$ or $2+2$, or $3+1$ or, indeed, $4+0$, you can add one to either number and it makes no difference to the total. It will still be five. But that isn't true under multiplication. There is a difference between 2×3 , 3×2 , 1×4 and 5×0 , so where you add the 1 actually matters. You would always add it to the lower number. Improving the worst pays off more than improving the best.

Human life, to a large extent, is lived under multiplicative dynamics. It is not a series of independent, context-free decisions that simply add or detract from the score. Take reputation. This is much more multiplicative than additive.

Shakespeare called it the 'bubble reputation', meaning it can very rapidly hit zero and become unrecoverable; it's not something that rises and falls in independent steps. Hit a reputational zero and you never recover.

Recently, experiments were performed to investigate whether humans changed their risk preferences according to the multiplicative or additive dynamics of the situation. The paper (see reference) bears deep reading, because understanding what people instinctively are trying to do in different contexts is vital to understanding human motivation. That multiplicative component is what the procurement department has missed, and what the real decision-makers intuitively understand. This paper is perhaps the most important work in understanding human motivation in 50 years. Read it before you read anything else.

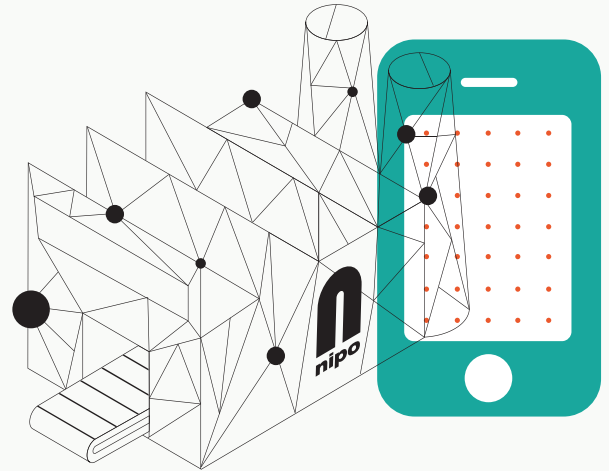
Here's wishing a healthily non-ergodic 2021 to all my readers.

Reference: *Ergodicity-breaking reveals time-optimal decision-making in humans*, Meder et al, pre-print at arXiv:1906.04652 (2019)

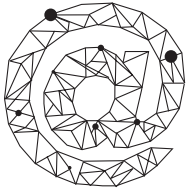
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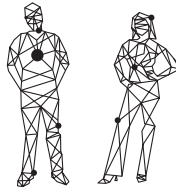
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“Consumers can have a difficult time understanding carbon neutrality because it is an abstract concept”

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In 2020,
46.6% of Nigerians had internet access

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The radio show **Yay Kyi Yar** had **3.2 million listeners**, equating to about a quarter of radio listeners in Myanmar

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“Women told of their lockdown-related fears and the impact on their ability to sell goods in a landscape where social norms restrict what they can do in formal employment”

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“A life-altering, deadly global health crisis during a highly contentious US presidential election magnified the known challenges of electoral polling”

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Agriculture accounts for **25% of total greenhouse gas emissions**

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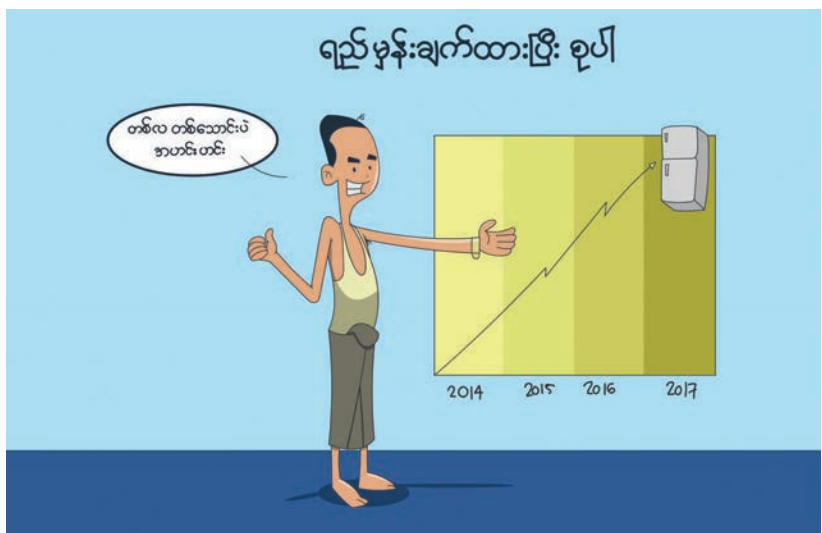
Moving money

To increase financial literacy in Myanmar, BBC Media Action produced a radio show giving tips for migrants and rural communities. By Liam Kay

The south-east Asian nation of Myanmar has a significant internal migrant population. Its 2014 Population and Housing Census estimated that there were more than nine million internal migrants – equivalent to almost 20% of the population – with people moving from the countryside to major cities for work as the economy shifts from agriculture to industry. Myanmar still has a large rural population; Unesco data shows that 65% of people live in the countryside.

To help migrants and rural communities, the BBC's international development charity, BBC Media Action, ran a project that aimed to educate people about financial management. The project was funded by the Livelihoods and Food Security Fund, with the objective of addressing issues around migration, work and money.

The charity decided to create a radio



magazine show, *Yay Kyi Yar (Towards Clearer Waters)*, to educate migrants and rural communities about finance, having identified it as an issue among both groups.

Running throughout 2017 and 2018, the programme was broadcast weekly on the national broadcaster, Myanmar Radio, and a community radio station in Thailand that reaches migrants from Myanmar. In 2019, the programme switched to television, where it ran for 11 episodes and was accompanied by a campaign on Facebook.

To inform the content of the show before its launch, the research team conducted focus groups with migrants in the city of Yangon, and communities in the Delta and Dry Zone regions and Shan state, to learn about their experiences, knowledge and current practices of financial management and migration, and to understand where gaps existed. This formative qualitative research found there was little prior knowledge about money management among rural and migrant communities.

Haug Nyoï, local research manager at BBC Media Action, says: “The cycle of debt in these communities is often not because of a lack of job opportunities, but because people are ashamed to let others know about their debt. Sometimes, people do not look for information. Sometimes, people thought it was their fate to be in debt.”

BBC Media Action worked with the production teams at the two radio stations to use the findings of the research to develop content for the show, with key areas identified and broken down by segment and episode. The researchers also pre-tested a pilot episode to gauge audience opinion on how informative it was and whether they found it enjoyable.

The team created a character called Mr Money to encourage people to engage with the show’s content in an amusing and lighthearted way.

“What we heard from the beginning to the end of the project, and still now, is that the main appeal of the programme was the Mr Money character,” says Anna

Colquhoun, international research manager at BBC Media Action. “When we were travelling around the country, if we mentioned that we were the organisation that made Mr Money, we were welcomed.”

The radio show ran for 78 episodes. The first phase of the evaluation involved qualitative research with people who had listened at home and those who had attended ‘listener clubs’, where communities listened to the show together. During this phase, the researchers conducted in-depth interviews and focus groups to understand the extent to which people’s attitudes or behaviour altered. The qualitative study involved 47 people.

The second phase, a quantitative survey, had two components: a nationally representative household survey comprising 3,000 interviews; and an additional 300 interviews with people identified as regular listeners, meaning they tuned in at least twice a month. It included questions on topics such as financial management, the show itself, migration, and media consumption.

In total, *Yay Kyi Yar* had 3.2 million listeners, equating to about a quarter of radio listeners in the country. Within that number, 1.8 million were deemed regular listeners. The show also had 700,000 Facebook followers by the end of its run, a figure that has since grown to more than one million.

The evaluation found that regular listeners were more knowledgeable, confident and more likely to be talking about managing their money than non-listeners, says Colquhoun. More than half (57%) of regular listeners reported that they had taken some action to manage their money because of the show.

“The actions people on the survey listed were almost entirely linked to the tips given by Mr Money,” Colquhoun says, adding that some of the most popular tips mentioned by the character included “saving with a particular objective in mind, saving small cash, making household budgets, and making a plan before you go to the market”.



Regular listeners were:

- 1.6 times more likely than non-listeners to say they were saving regularly when controlling for other key variables
- Twice as likely to say they had compared interest rates before taking out a loan
- 1.5 times more likely to have discussed money matters with someone close to them.

Additionally, 71% of regular listeners felt their knowledge of how to manage money had increased over the previous year, compared with 57% of non-listeners.

The show recently resurrected the Mr Money character during Covid-19, to discuss migration, workers’ rights and pandemic preparations.

“The reason Mr Money was successful was because of his plain-speaking language,” says Colquhoun. “He was entertaining and he gave people tips that were really easy to do. Those same principles were then brought into how to approach Covid-19. All the tips he gave were easy to implement as an individual and as a household.

“It was an antidote to the more serious information they were hearing from the government or from other sources, which perhaps didn’t engage them in the same way.”

States of flux

The 2020 US presidential election took place against the backdrop of a global pandemic. Chris Jackson shares some of the polling challenges

During the best of times, election polling is fundamentally challenging. The act of asking people who they may support relies on them predicting their future behaviour, something research indicates people are notoriously bad at doing. Even for the quickest, highest-quality poll, time moves, circumstances change, and support for candidates can shift. So, pollsters poll a lot to try to capture this movement throughout an election cycle.

In the US, presidential elections are increasingly decided by a few thousand votes as the public has become locked into their party of choice. Low turnout or variations in how ballots get counted can be the difference between winning and losing. The 2020 election amplified these issues.

A life-altering, deadly global health crisis during a highly contentious presidential election magnified the known challenges of electoral polling, while pandemic-specific problems threw us more curveballs. Not only did we have to consider the usual questions, such as who is going to vote – as we do every election cycle – but we also had to adapt our thinking around how, and when, people would vote.

There are three things that made US presidential polling particularly challenging in 2020: there was no playbook for voting during a pandemic; we were living through a volatile time; and there were many disturbances to voting and vote counting that made it difficult to quantify how voting would play out.

To begin with, we were largely going off script, as there was no past data to gauge how a pandemic impacts turnout in an election. This meant there was no widely accepted way to cross-check any of the assumptions we made about voters under these unique conditions.

We worked around this by employing a multi-modal approach to research. We ran national surveys twice a week on our opt-in panel and tracked six swing states weekly, from mid-September until election day. To calibrate our weighting and ensure our opt-in sample was representative of both the population and the likely electorate, we ran surveys on our probability-based panel, and compared findings at the beginning and end of the research period.

Polling frequently served two purposes. First, it acted as a thorough way of checking the quality of the information we were receiving. Second, so much of our world has changed over the past year, so there was a higher potential for volatility among voters. What we saw, though, was that partisanship largely held behaviour and attitudes constant throughout this cycle.

Perfect storm?

As a result of polling at a high volume, we were initially worried that, with all that was going on, people may not want to – or be able to – focus on a poll. The quantity of polling and the turmoil so many people were experiencing in their day-to-day lives could have been the perfect storm for respondent fatigue.

At the beginning of the pandemic, surprisingly, we saw an uptick in online survey response rates, as people were tied to their screens at home. We also benefited from having a robust online polling infrastructure to ensure polling was not going to the same people week after week. The cadence of our polling this season allowed us to keep polls short. No survey took longer than 10 minutes to complete.

We tweaked our likely voter questions to reflect the messy reality of how voting

played out across the country. We always ask a series of questions about vote history, interest in the election, and people's intention to vote. We then use that information to score each respondent on their likelihood of voting, charting the probability of each candidate winning when turnout and vote share changed.

We also asked how people planned to vote, in addition to our usual series of likely voter questions. We then compared that with information from places such as Ballotpedia, or the various secretaries of state, on how ballots were counted early, and compared that with the results we got from our polls.

By no means was this a silver-bullet solution. Every state counts votes at different times and does so differently. We expected lots of lawsuits over what votes would or would not count. This is largely beyond the scope of what pollsters can price into their likely voter models. To the best of our ability, we tried to check our results against the most readily available public sources, but these are imperfect tools that are subject to change.

Those adjustments gave us a fuller picture of how people were feeling about voting, whether they were following the election, and how they planned to cast their vote.

It was a daunting challenge to put all the pieces together and make it work. After the 2016 election, we re-evaluated how we conducted our election research, choosing this year to poll up until election day, nationally and in six key battleground states, and using many different modes of research outside of polling to paint a fuller picture of where the country stands.

With 2020 resulting in a narrow victory for Joe Biden in the electoral college, what the polls and the vote count can agree on is that the US is a divided nation.

● **Chris Jackson is senior vice-president and lead for public polling at Ipsos US**



**Around 66.5%
of the US electorate
voted in the
2020 presidential
election**

(US Elections Project)

**More than 101m
people voted early
in the
2020 election**

(US Elections Project)

**There were 107,872
positive tests for
Covid-19 in the US on
4 November – the day
after the election**

(New York Times)

Sustainable conversations

Maple Leaf Foods used behavioural science to determine how to communicate carbon credentials to customers.

By Darlene Macdonald and Amy Knowles

Toronto-headquartered packaged-meats producer Maple Leaf Foods declared its carbon neutrality in November 2019. Maple Leaf wanted to ensure Canadian consumers understood the importance of this step and to find out how best to convey its carbon-neutral message.

It designed a research programme with Research Strategy Group to understand how much Canadians knew about carbon neutrality and how the topic should be communicated to best engage consumer interest.

The initial research phase combined ethnography with behavioural science to explore people's views and values regarding carbon neutrality. This involved 21 in-home ethnographies in four Canadian cities – Montreal, Toronto, Calgary and Vancouver. Respondents were purchasers and consumers of pre-packaged meats and/or deli meats, and had a variety of views and awareness of sustainability and climate change.

These approaches allowed Maple Leaf to paint a picture of what carbon neutrality means to people and to understand the factors that may impact people's purchase decisions for protein products.

The qualitative research uncovered seven cognitive biases that drive consumer understanding of environmentalism and carbon neutrality:

- 1.** Diffusion of responsibility and confirmation bias – most respondents felt that the bulk of the responsibility to combat climate change should be taken on by large companies, but, at the same time, they wanted to contribute to efforts.
- 2.** Leverage the status quo to build trust – trust in Maple Leaf Foods as a brand could be leveraged for more abstract concepts, such as sustainability.

- 3.** Visualise the difference – consumers can have a difficult time understanding carbon neutrality because it is an abstract concept.

- 4.** In-group bias and reciprocity – for many consumers, sustainability means giving back to the local economy.

- 5.** Delay discounting – convenience and cost often trump potential future rewards that might stem from making sustainable choices.

- 6.** The halo effect and leveraging emotional salience – sustainability, animal welfare and food freshness are interconnected in consumers' minds.

- 7.** Wilful ignorance – consumers do not want full transparency into meat manufacturing processes, but want to know how large companies will tackle carbon neutrality.

Maple Leaf Foods then developed a set of corporate messages, on-pack claims and logos. Each cognitive bias/theme identified had several messages and claims built to resonate with this bias, and these were tested quantitatively.

The quantitative phase was conducted

via a national online survey across two cells: cell one determined the most effective corporate messaging, and cell two the most effective on-pack claims. There were 2,055 respondents across the two cells and they included a nationally representative sample of primary grocery shoppers, aged 18 or older, who had purchased meat products in the past three months.

At the core of the quantitative design was discrete choice modelling, which identifies how consumer groups will respond to various combinations of messaging statements. In cell one, respondents considered message combinations and made choices based on their preference. This provided a comparison of the individual strength of each message.

The second cell was focused on determining which packaging claims and logos would drive increased purchasing interest in the Maple Leaf brands.

The research is being used to underpin all carbon-neutrality communications, with an integrated communications and multimedia advertising campaign building awareness for the company's carbon-neutral status. The brand is planning more initiatives and has developed carbon-neutral-related content tracks to support sustainability-focused conversations.

After the campaign launch, searches for 'carbon neutrality' peaked in Canada. The campaign also resulted in 50% of viewers for its online advertisements watching the ads in their entirety.

● **Darlene Macdonald is senior director, consumer insights, at Maple Leaf Foods, and Amy Knowles is senior vice-president at Research Strategy Group**

Agriculture and climate change:

- Agriculture accounts for approximately 25% of total greenhouse gas emissions (Our World in Data)
- Meat and dairy production accounts for 18% of global carbon emissions (Food and Agriculture Organization of the United Nations)

Overcoming barriers

Research from Basis used WhatsApp to access hard-to-reach communities and explore Nigerian women's experiences of the pandemic. By Charlotte Smith

Covid-19 has impacted research in many ways, not least face-to-face qualitative studies. Basis was conducting digital research in many parts of the world before March 2020, but less so in developing markets. The challenges are different: connectivity, the affluence skew, and levels of digital and basic literacy.

Nigeria is hugely complex and often poorly understood. In parts of northern Nigeria, it's not unusual for women to spend much of their time at home, for safety or cultural reasons; we hadn't been allowed to travel there for face-to-face fieldwork by insurers previously. We know the impact of Covid-19 on women's daily lives worldwide is typically greater than for men – and, in Nigeria, we hypothesised this may be more acute.

We began a digital-only study with women across Nigeria, focused on their daily lives post-pandemic and women's roles and social norms. We ran two project stages on WhatsApp with 34 women – starting with a diverse group across the country, then a smaller set in northern Nigeria. We ran multiple group tasks: chat around moderated topics; a lockdown log; and photo and video uploads.

We heard about women's place in Nigerian society. They told us about lockdown-related fears of starvation and crime, and the impact of the pandemic on their ability to sell goods in a landscape where social norms restrict what women can do in formal employment.

Participation in the research exceeded our expectations. Women were already using WhatsApp for commercial and social purposes, so they were actively engaged. They were honest and open – they typed with emojis, and shared pictures and jokes. This level of contribution surprised us initially, but, then, many of us share information about our lives on WhatsApp.

This is where its dynamic is so useful for qualitative research; people are at ease.

Maximising WhatsApp for research:

- We spoke to respondents in groups, although we allowed private messages too. The former worked better because it felt like a 'normal' group chat, where there's never too much pressure but everyone is welcome to speak
- Even with conversation in English, we needed a moderator with local experience to know when to stop asking questions, when to push for more, and to reply in Hausa at times
- Self-shot videos told us a million things very quickly about participants' environment and daily life. A Google Images collage task told us nothing because everyone drew from the same bank of pictures
- A two-phase process was invaluable. It

helped us refocus on the really interesting material at the second stage.

We can overcome data affordability as a barrier with incentives, but we can't give smartphones to those who don't own them and expect intuitive contribution. This is not a way to reach the digitally excluded, the older or more rural.

WhatsApp is encrypted and secure, but hiding your number in a group is impossible. There are ways around this, such as broadcast or business mode, if we wanted people to respond individually – but this would lose a lot of the group experience. We ensured respondents were aware of this in advance, and it wasn't a problem, but elsewhere it could have been.

For the right project, WhatsApp works well as a qualitative platform. In addition to digital-only projects, we'd use it as a framework for capturing user-generated content alongside face-to-face. Given the right objectives, it's a powerful tool.

● **Charlotte Smith is global head of qualitative at Basis**

In 2020, 46.6% of Nigerians had internet access. This is expected to reach 65.2% by 2025 (Statista)

Nigeria ranked 128th out of 153 countries for its gender pay gap (World Economic Forum 2020 Gender Gap Report)

COGNITIVE DISSONANCE

The assumption trap

The EU referendum and the last general election betrayed a chasm in understanding between the mainstream population and the cultural elite. Elen Lewis investigates the role of market research in breaking down assumptions

During the height of the Covid-19 restrictions, a market researcher working on a financial services brief was shocked to hear an advertising agency planner claim: “Everyone seems better off in lockdown because we’re saving so much money.” Even though the daily news forecast a global meltdown, the Hackney ad-land echo chamber was telling them something different.

The research proved otherwise. Talking to taxi drivers, café workers and event planners revealed another reality about some of the mainstream population – their livelihoods had been devastated overnight and they were facing the breadline.

It’s more than four years since the EU referendum, and many of the soul-searching questions around echo chambers and filter bubbles remain crucial today. Has marketing forgotten the mainstream or are they being misunderstood – and how can market research ensure assumptions are avoided?

As one researcher says: “People don’t move outside their bubbles. But research can make the circles outside your echo chamber vivid.”

What does the mainstream look like?

The most important, albeit obvious, thing to say about the mainstream is that it’s a large, powerful audience. Newspaper publisher Reach and research agency House51 define the

‘modern mainstream’ in commercial terms – as the middle 50% in terms of household income (£20k-£55k), who represent more than 50% of brand buyers and constitute more than 70% of the population. Similarly, the ABC1 v C2DE measures favoured by the marketing and media industries show that 45% of the population is C2DE.

“This audience is the heartland of Britain – builders, plumbers, hairdressers,” says Steven Lacey, managing director of The Outsiders and author of *The Age of Rage* qualitative research, exploring the temperature of the mass mainstream (C1C2) in lockdown. “They hold the keys to No 10 and we’ll keep getting shocks such as Brexit and Trump if we continue to ignore them. But they’re not cool, they’re not linked to music, they won’t necessarily change the world, so we’d prefer to have a conversation about sustainability than the working-class community in Doncaster,” he adds.

Lacey believes the marketing industry finds it much harder to talk about class than other areas of diversity, such as race. “This is the one group we find a bit embarrassing,” he says. “The white working class is the biggest audience with the biggest unconscious bias from the industry.”

He’s not the only person to note that socio-economic class is often absent in discussions about diversity and inclusion. People of working-class origin are rarely featured or celebrated in the

rapidly expanding coverage of diversity in the trade and mainstream media.

Lacey talks of prejudice in terms of prototypicality – where people immediately think of a magpie rather than a penguin when asked to think of a bird. “People think of stereotypes – estates, teen mums, Benidorm, Brexit, football huggery, or the far right. The only people who’ve really understood this audience is the Conservative Party.”

Understanding the ‘red wall’

Deborah Mattinson, co-founder of Britain Thinks, believes we need to reassess what the mainstream is in our divided nation. “We’re divided by values – by what we feel, as well as demographics. Perhaps there isn’t a mainstream anymore?”

Mattinson’s book, *Beyond the Red Wall*, examines the five million people forgotten by the political class in the former Labour heartlands of Stoke-on-Trent, Accrington and Darlington. “It’s so striking how forgotten those places are... and it’s incredibly important for everyone – not just politicians who have a duty, but also marketers – to better understand them,” she says.

In October 2020, the north-south divide reared its head again with the government’s handling of the Covid-19 tier system. Mattinson talked to people who were disappointed with the Tory government they had voted in. They felt their communities were being starved of cash. As Mattinson points out, the ‘red wall’ in itself becomes a metaphor for this feeling of neglect.

Talking to the mainstream

Many market research agencies are based in the capital, but Andrew Tenzer, director

“We’re divided by values – by what we feel, as well as demographics. Perhaps there isn’t a mainstream anymore”

Deborah Mattinson

of group insight at Reach, believes the industry needs to get out of London to better understand the mainstream.

It’s significant that, pre-Covid-19, conducting qual research outside the capital would often increase a client’s bill, with the addition of travel and hotel costs. Indeed, Caroline Hayter, co-founder of Acacia Avenue, suggests that the pandemic has been a helpful force in terms of boosting the diversity of recruitment through online panels.

“Classic recruitment used to be done by a woman with a little black book. With online panels, we instantly get a more diverse set because they’re geographically dispersed. Recruiters play an important role in diversity – they can

no longer refer to tried and tested methods,” Hayter says.

However, Ian Murray, co-founder of House51, believes the failure to understand the mainstream lies deeper than geography. “It’s a deep structural and cultural issue in our society, and our industry is a reflection of these wider forces,” he says.

There are also assumptions about the role and usefulness of respondents of a particular socio-economic class. Lacey recalls going to a meeting with a betting client who was advised by another researcher to exclude people from DE groups because they wouldn’t have any ideas. Fortunately, the client disagreed. He pointed out that DEs

equalled one-third of their customer base. “If you’re at the DE end, you’re often thought of as unintelligent and not good enough to get ideas from,” Lacey suggests.

Misunderstanding the mainstream

This socio-economic blind spot is not merely a social equality issue, but also business-critical for the marketing industry. Murray says: “If I’m getting this wrong, and not landing my communications or building products that reflect the reality, that’s bad for business. It’s not simply the right thing to do, but the effective thing to do.”

The communication industry’s

preoccupation with ‘purpose’ in a Covid-19 world is redundant, according to Lacey. Brands who want to appeal to the mainstream should be considering how they can improve lives – for example, through supporting a youth club, offering coupons, or keeping prices low. “This audience don’t sit there and think about the deep meaning of an ad; they like directness,” he says.

Lacey cites one research participant who wasn’t impressed with brands ‘reaching out’ during lockdown. “They remind me of those beta males who are trying too hard, pretending to be your friend.”

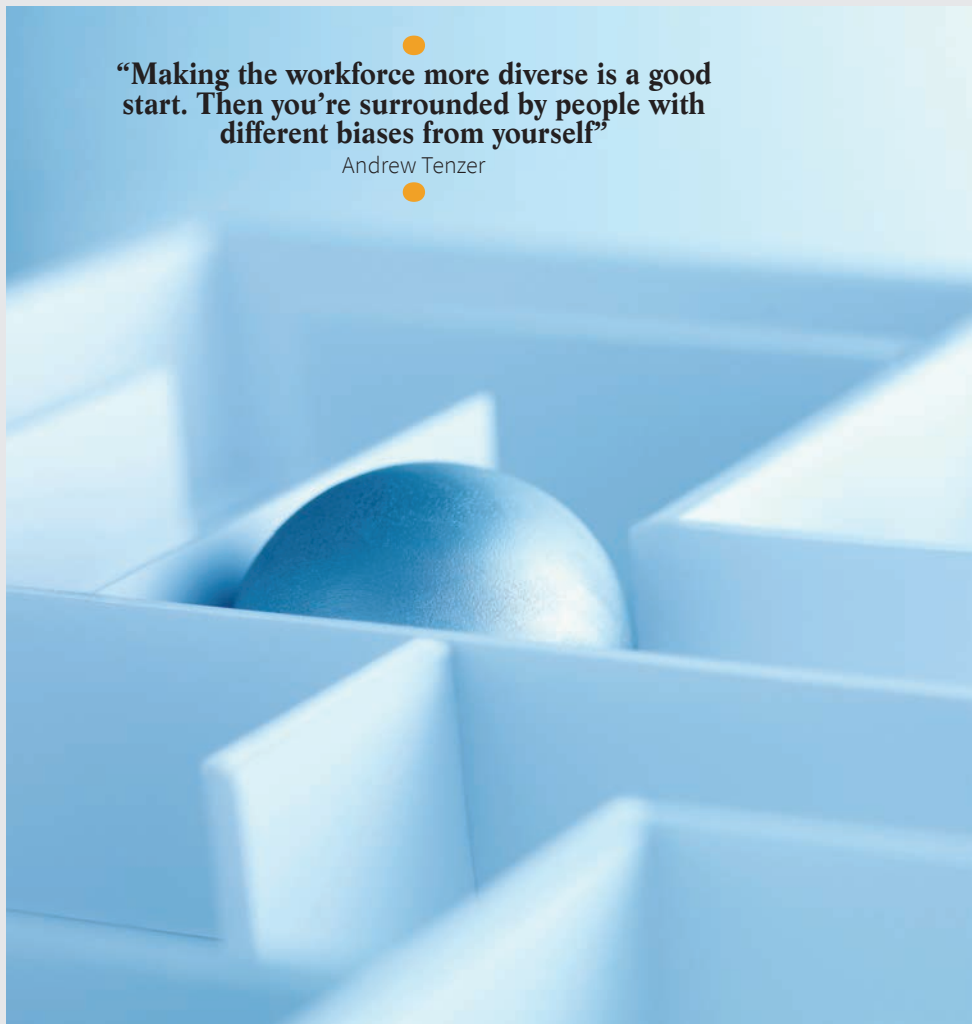
Awareness of bias

As humans, we’re all capable of bias, even if we’re market researchers with honed critical-thinking skills. The trick is accepting that it exists, and continuing to analyse, interpret and check for bias all the time.

Ella Fryer-Smith launched the Unequal Truths podcast during lockdown, to tell the untold stories of researchers from low-income backgrounds. She believes we need to scrutinise assumptions about what matters at every stage of research – from setting objectives, who we’re speaking to, and how we’re speaking to them, right through to the final analysis.

Increasing time pressure from clients, however, and the premium placed on a fast turnaround with lightning-quick insights, makes it ever more challenging for researchers to consider bias in their analysis properly. Murray says: “The risk is that we don’t step back and think about how insights have been developed, and if they are objective.”

There is also concern that these biases might become burned into new technology. For example, in 2015 Amazon abandoned an automated recruitment experiment when it discovered its artificial intelligence (AI) hiring tool was not rating candidates in a gender-neutral way. In the summer of 2020, the A level statistical model was another stark illustration of what goes wrong when assumptions pollute data. AI and algorithms learn from historical



practice, but what if we’re hardwiring bias into market research tech systems?

Alienating audiences

The elephant in the room is that very few research consultants come from a working-class background, so they do not reflect the mainstream audience from which they are tasked with gleaning insights. It was during an ethnographic field trip to a Sheffield council estate that it dawned on Fryer-Smith that her colleague did not understand the nuances of who they were talking to.

“We were in the [participant’s] car, when the interviewer made a disparaging comment about all the satellite dishes

on the estate. They had no idea that what they were saying might be alienating.”

Konrad Collao, co-founder of Craft, had a similar experience during his early career as a researcher. Travelling with a London colleague to conduct research in Bristol, the train from Paddington slowly passed the council estate where he grew up. “There were lots of St George’s flags flying because of the World Cup,” he recalls. “And she said, ‘look at all the chavs flying their racist flags’, and I said, ‘that’s where I live.’”

In his latest book, *Head, hand, heart: the struggle for dignity and status in the 21st century*, David Goodhart explores a societal condition he

describes as ‘peak head’, where cognitive achievement acts as a sorting mechanism in a supposed meritocracy. This is a particular problem, he suggests, in Britain and the US, and we have come to disproportionately value people who work with their head.

Along the way we have forgotten to value technical and practical abilities (hand) and caring and empathetic skills (heart), while alienating and demoralising people who do these jobs.

So, could it be that the marketing industry is suffering from cognitive dissonance leading to a tendency to make assumptions? Reach’s Tenzer and House51’s Murray think so. They have co-authored a number of white papers arguing that advertising and marketing professionals tend to have different thinking styles from mainstream communities [see panel, ‘Different thinking styles’].

Breaking down assumptions

Ethnography was cited by a number of experts as a key methodology to glean deeper understanding of the mainstream, offering an opportunity to literally ‘walk in the shoes’ of an audience they didn’t yet know. It was the beginning of a journey of understanding.

As part of her ‘red wall’ research, Mattinson used co-creation workshops, which she argued could be a way to break down assumptions. ‘Red wallers’ were placed in the same room as ‘urban remainers’, alongside some politicians, and asked to find common ground.

Focus groups can also play a key role in addressing assumptions by bringing clients into contact with people they might never have met otherwise. Hayter recalls working with a financial services company where the clients – both white, well-educated, upper-class males – had the wool torn from their eyes. “Their assumption was that people with a high-risk financial profile were disorganised, irresponsible or incapable,” says Hayter. “Then we interviewed a minicab company owner who’d gone bust the day after Lehman Brothers because they were his biggest client.”

Fryer-Smith and Collao both believe a new approach to industry recruitment is essential to drive change – and that means letting go of only considering university graduates. “This is about social and cultural capital,” says Collao. “We have to get people in the door to change things. There’s nothing wrong with having them in the post room, but that’s not going to set the agenda.”

Early steps are being taken. For example, Ipsos Mori has removed the necessity of a 2:1 degree for applicants and is conducting cognitive testing instead, while the MRS is working towards the launch of the research apprenticeship, and encouraging all research businesses to take its CEO Pledge.

Jane Frost, chief executive of MRS, says: “Opportunity matters and we must find ways to train people in the appropriate skills and reach non university-educated talent.

“The MRS [with the Advertising Association] has also proposed the creation of a skills grant as part of the government’s response to Covid-19, which is focused on online professional development, so would benefit workers wherever they are. It is aimed at school leavers hoping to get into research, as well as those who need to reskill and/or have been made redundant because of the economic impact of the crisis.”

It’s clear that diversity conversations in the industry must include everything and everybody if they’re going to drive change.

As Tenzer says: “Making the workforce more diverse is a good start. Then you’re surrounded by people with different biases from yourself.”

Back to Fryer-Smith: “We need everyone’s voices in the room. How can we understand society if we don’t reflect society? There’s no excuse in our industry. We understand demographics, we understand differences, we should be better placed than most.”



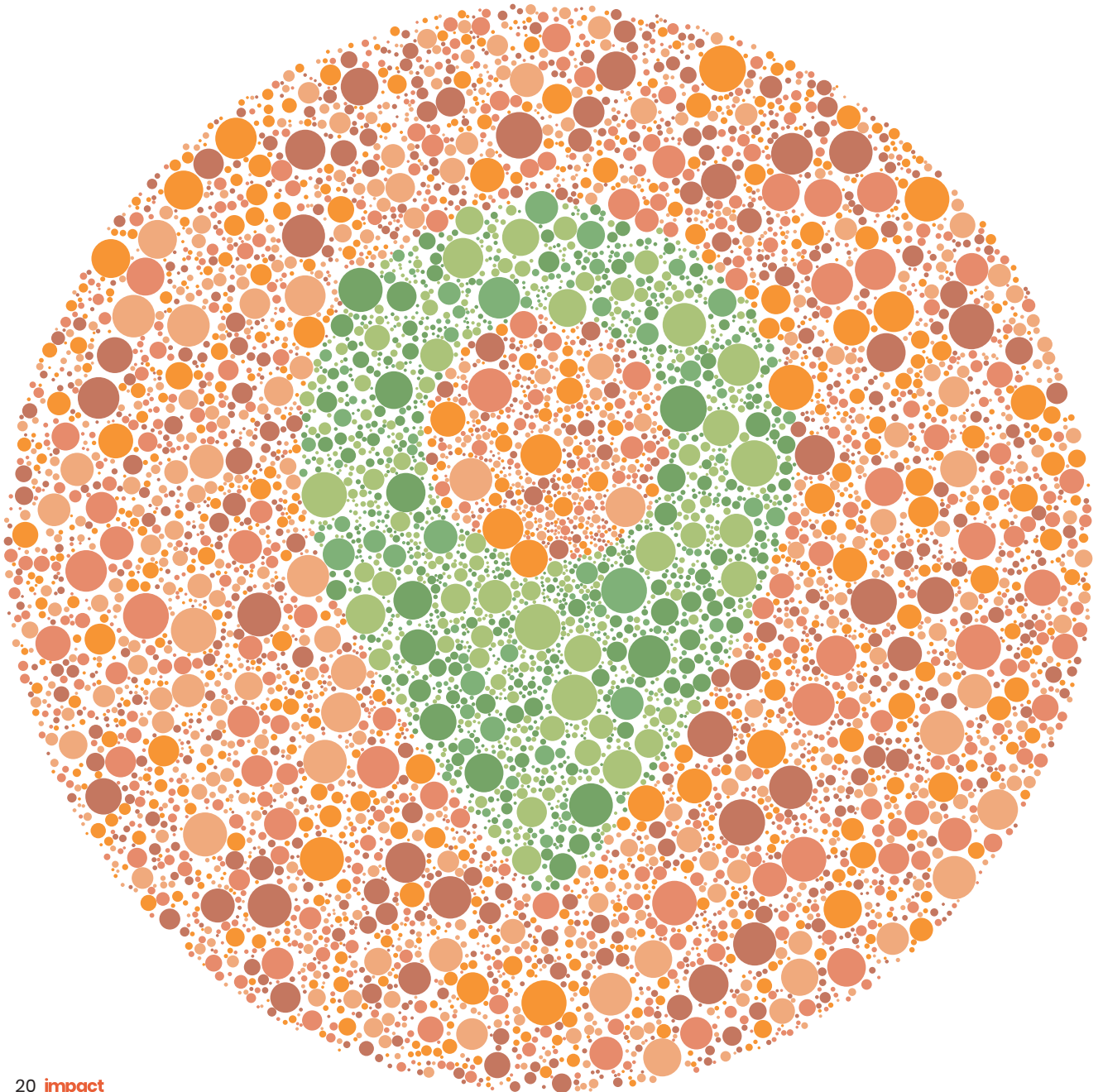
Different thinking styles

Over the past couple of years, Reach’s Tenzer and House51’s Murray have co-authored a number of white papers (*Why we shouldn’t trust our gut instinct*, *The empathy delusion* and *The aspiration window*) highlighting the problem of cognitive dissonance with people in the advertising and marketing industry and mainstream communities.

People in the industry see and experience the world differently. While those in the ‘modern mainstream’, as defined by the research, tend to have a more holistic and collective thinking style, those working in marketing tend to have a more individualistic and analytic thinking style.

Similarly, people in the advertising and marketing industry placed more emphasis on extrinsic motivations – such as fame, wealth and image – than the mainstream. This viewpoint also extended into the advertising and marketing industry’s view of other people’s quality of life with different incomes. For example, people in advertising and marketing dramatically underestimated the quality of life for everyone earning less than £50,000 per year (around 77% of the population).

Staying local, going global





The balance of globalisation has shifted in the past 20 years. For brands looking to target international efforts and evaluate opportunities at a global scale, tailoring their market research to local nuance is a vital first step. By Richard Young

The global economy is here to stay. But 2020 taught us that, within that global picture, local markets evolve unevenly, unpredictably and are subject to rapid change. That's made multi-market insights even more essential for global brands and those planning to expand internationally as we enter a new era for regional trade relationships.

Finding the right balance between local insights and global uniformity is hard. The marketing history books are littered with examples of a basic failure to localise, often with hilarious consequences [see boxout overleaf, 'What's in a name?']. More seriously, global brands face a challenge: ensure research controls for cultural, language and infrastructure differences, but also generate insights that can be benchmarked across markets and aggregated to inform global decisions.

"As a global brand, you want to use the same product and the same campaign everywhere," says Stephen Phillips, chief executive at Zappi. "You need to know how many compromises are worth making. Sometimes they're too numerous; lots of global beer companies simply end up buying local brewers - they're not even trying to push global brands too much. Local research tells them the economies of scale are in distribution, not marketing."

Local research also depends on national culture and the nuances of local language and dialects. So how can organisations ensure their

research is providing reliable insights even on a local scale, much less informing global decisions?

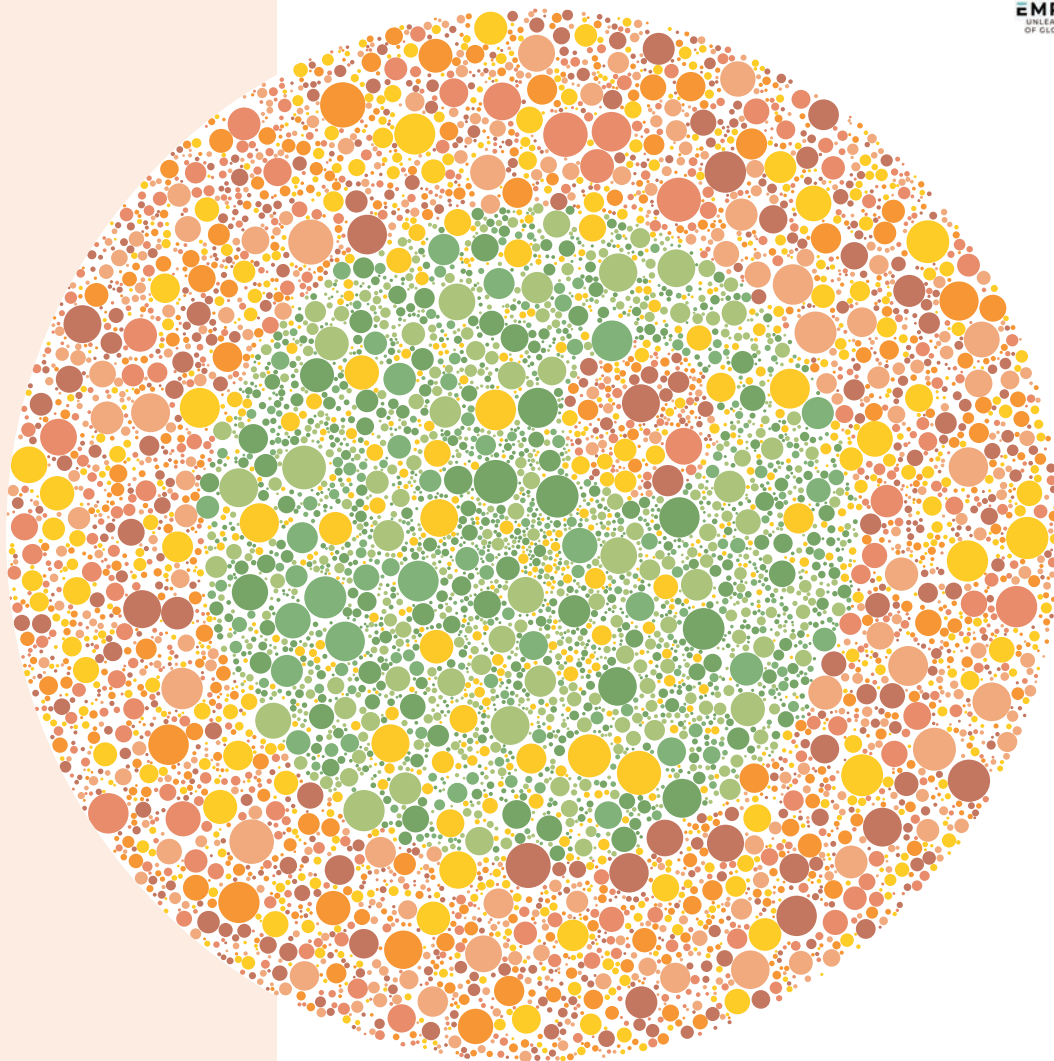
"When a global brand puts forward a research hypothesis, we look to recontextualise it for individual markets, not just talk about the language," says Ruth Partington, founder and chief executive of Empower Translate. "Equally, you have to look at how to take local outputs and fit them into a balanced global interpretation."

At the most basic level, research needs to establish how a brand can operate in a given locality. Parves Khan, global research and insight director at educational publisher Pearson, says the local/global split is defined by two issues. "First, infrastructure. The rate of adoption of devices and quality of connectivity in each market is a huge factor for us. In some, we'll need to tailor a more light-touch experience; in others, we can roll out more data-intensive products that are demanding on bandwidth and storage."

Then there's culture. "In some countries, providing something exclusively online just won't do," Khan explains. "People want the option of face-to-face learning, so you have to pursue a blended approach. But some products are only available online, and some are still purely in print. So, we need to test assumptions around those cultural biases, too."

Those two factors - determining how a brand can operate and understanding culture - also define the kind of research you can do in each locality, and how to interpret

"You have to look at how to take local outputs and fit them into a balanced global interpretation"



What's in a name?

Oil of Ulay became Olay. Marathon turned into Snickers. Opal Fruits changed into Starburst. Global corporations love to create uniformity in their brand names and marketing campaigns, usually to reduce costs. The problem is, they sometimes translate rather unfortunately. Here are a few from the marketing archives – which perhaps might have been avoided with some good local research.

- Clairol had a curling iron called Mist Stick. Unfortunately, in German, 'mist' is slang for manure. Vicks had a problem in the country as the German 'v' is sounded 'f', making 'Vicks' slang for sexual intercourse.

- Coors' slogan 'Turn it loose', when translated into Spanish, is a colloquial term for having diarrhoea, while the American Dairy Association's 'Got milk?' campaign translated into 'Are you lactating?' in Spanish-speaking nations.
- Ford's Pinto model didn't go down well in Brazil, where it's a slang term for 'tiny male genitals'. Mitsubishi had to change its Pajero brand in Spanish-speaking countries, where it was understood as 'masturbator'.
- KFC is known globally for being 'finger-licking good' – which translated as 'eat your fingers off' in China. Also stung there was Mercedes-Benz; a Mandarin-ised

version of the brand, 'Bensi', means 'rush to die'. And global slogan 'Pepsi brings you back to life' appeared in China as 'Pepsi brings you back from the grave'.

Some brands get it right. Locally produced signs for Coca-Cola ('ko-ka-ko-la'), when it was first sold in China, were sometimes translated as 'bite the wax tadpole' or 'female horse fastened with wax'. But the company was already developing a local brand, settling on the symbols 'K'o-K'ou-K'o-lé' – which means 'to allow the mouth to be able to rejoice' – a far more apt trademark that it registered in 1928.

it. “It’s rarely a plug-and-play solution in every market,” says Phil Steggals, global head of research and strategy at Kadence International. “You need to know what kind of insight the client is looking for, as well as having the local context and experience. Then it’s about managing the expectations on both sides.”

Additionally, there’s a “big difference” between assessing existing markets and expanding into new ones, according to Fiona Blades, chief experience officer at Mesh Experience. “In that case, there’s much more onus on the agency to have their own local presence, to ensure that context is provided.”

Taming the methodology

Methodologies must be tailored for each market, and that isn’t a fixed target, says Steggals, citing Indonesia as an example. “People were happy to speak on the street in a way that would be almost impossible for a researcher in London, but they didn’t like phone research. Then there was a switch to smartphones and, suddenly, research on mobiles took off, and people were happy to give data and download apps, even while they were still reluctant to do phone interviews.”

Times change, then – but, often, history has a bearing on the local perceptions of different methodologies. “In eastern Germany, for example, the folk memory of the Stasi runs deep – there’s a suspicion of people asking questions, even via anonymous questionnaires,” says Bianca Abulafia, global head of qualitative at Kadence. “So while your discussion guide might have the same

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“Having that cultural touch is more than just knowing what questions are pertinent; it’s knowing how the client will use the information”
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key points in it, for Germany, you might gently lead into more personal questions; then, in France, there are lots of things you’re simply not allowed to ask, around race, gender and religion.”

That can make it hard for the methodology to deliver comparable

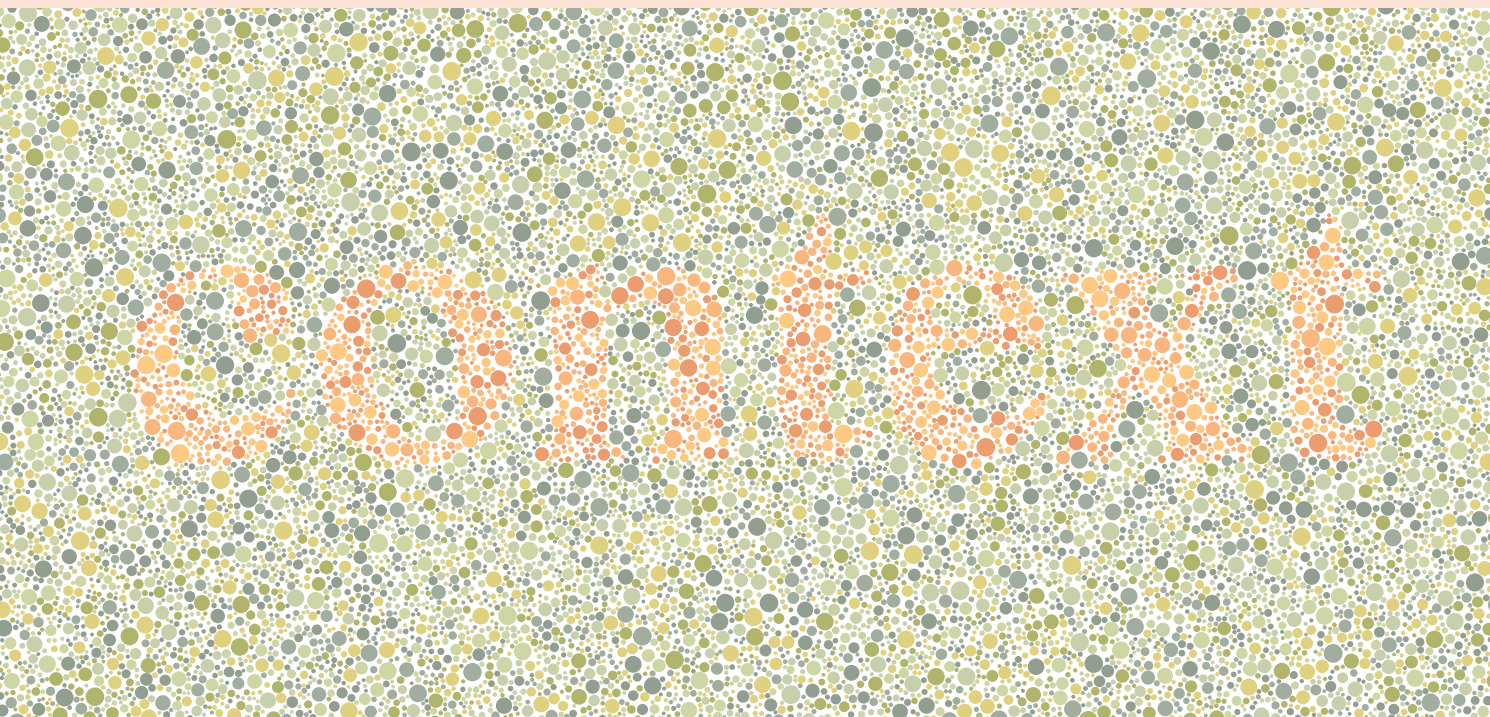
data. “If you want quant in different markets, we often suggest doing in-depth qual first to dig under the surface,” she continues. “We worked on a project in Saudi Arabia, looking into the popularity of shows that might have been frowned upon in some quarters. Running quant would only have got the client so far – there needed to be research to warm up the respondent community, build trust, and then dig into the context for their preferences.”

Context is all

Sensitivity to all these issues is hard won. Mesh Experience has offices around the world, but Covid-19 restrictions on travel – and the rise of more digital qual during lockdowns – has affected the ability of research teams to go ‘in country’.

“The challenge is that, if you’re asking someone from overseas to do work remotely, do they have the right context?” asks Blades. “Are they seeing the current ads on TV or billboards? Do they know the subtleties of the local brand associations? Having that cultural touch is more than just knowing what questions are pertinent. A big part of it is knowing how the client will use the information you’re generating.”

More fundamentally, will a global client get the nuances of local fieldwork? “Understanding why emotions are



triggered in different cultures or regions is really important,” says Clare Partington, marketing manager at Empower Translate. “So, while machine translation, for example, is getting good, it loses the subtlety; it struggles with idioms; it misses the emotional salience that’s important to both qual and even quant research.”

A participant might quote a local nursery rhyme in a focus group, for example. A local might pick up a lot of meaning; a foreign translator might understand the context; but a machine translation is just going to give a verbatim that lacks any meaning. If you have a quant project looking at keyword frequency, maybe that’s less important; for a qual project, that might skew your insights badly.

Localisation isn’t just about translation services, either – which is where awareness of both culture and infrastructure come back in. “For example, we helped on a study looking into equipping hospital rooms,” says Ruth Partington. “French and German focus groups expressed some quite different views – which only made sense when contextualised against the décor and arrangement of the typical rooms in each country.”

Global, regional, local?

There’s a political dimension to all this, too; to avoid tensions between global, regional and local teams, engagement is key. “People in many markets are really not that happy to be lumped into a regional hub by global brands, much less

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“People in many markets are really not that happy to be lumped into a regional hub by global brands”
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subsumed into a global perspective,” says Phillips. “An insight solution across 37 countries looks brilliant to a global team. Then you come back a couple of months later and it turns out the client team in Poland had some compelling reason not to use a particular part of the methodology, or the Romanian team wants to work with a local agency... it can be a battle.”

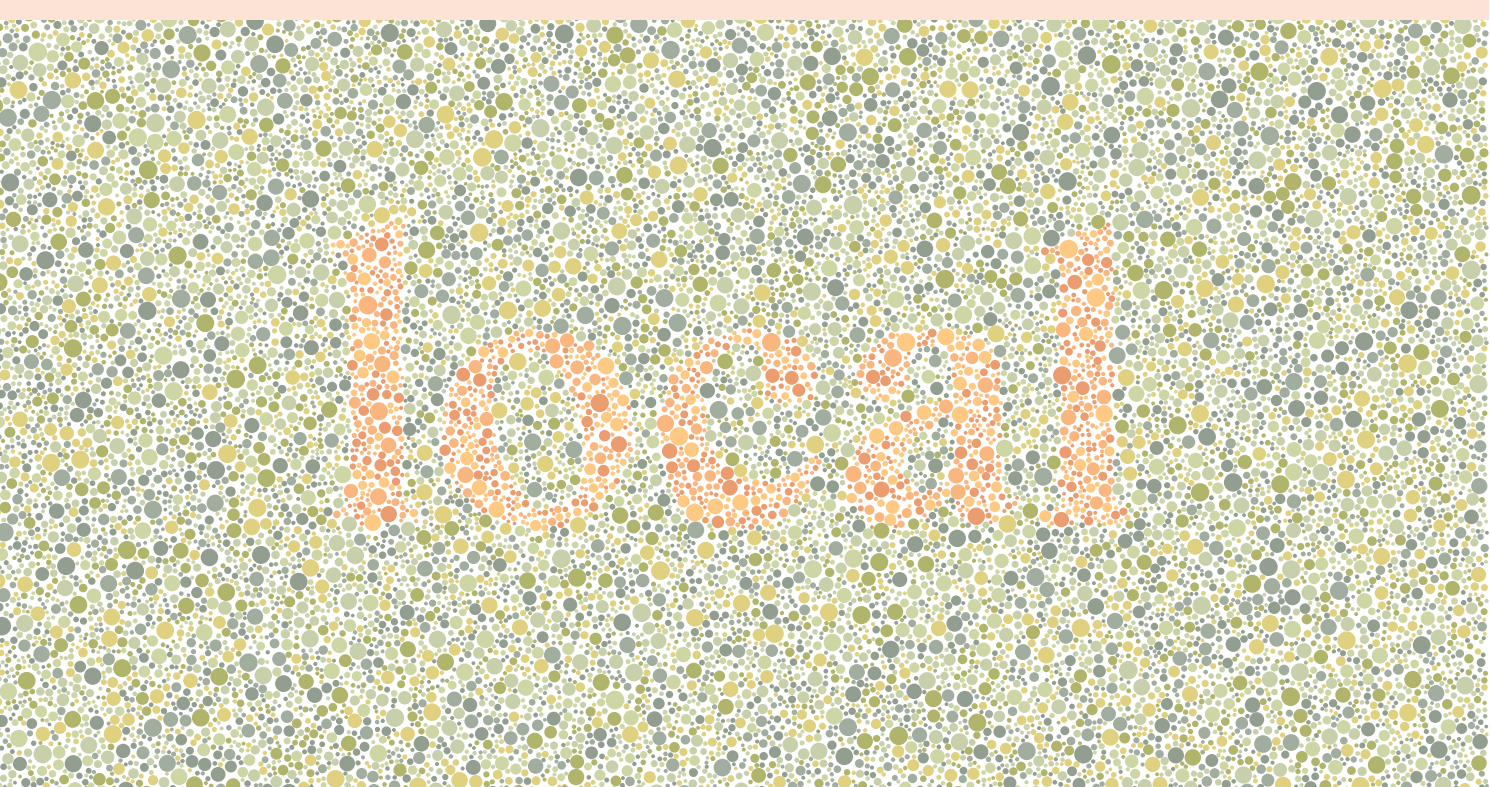
While some brands devolve a lot of autonomy to regional and national teams, others have stricter expectations, notes Steggals.

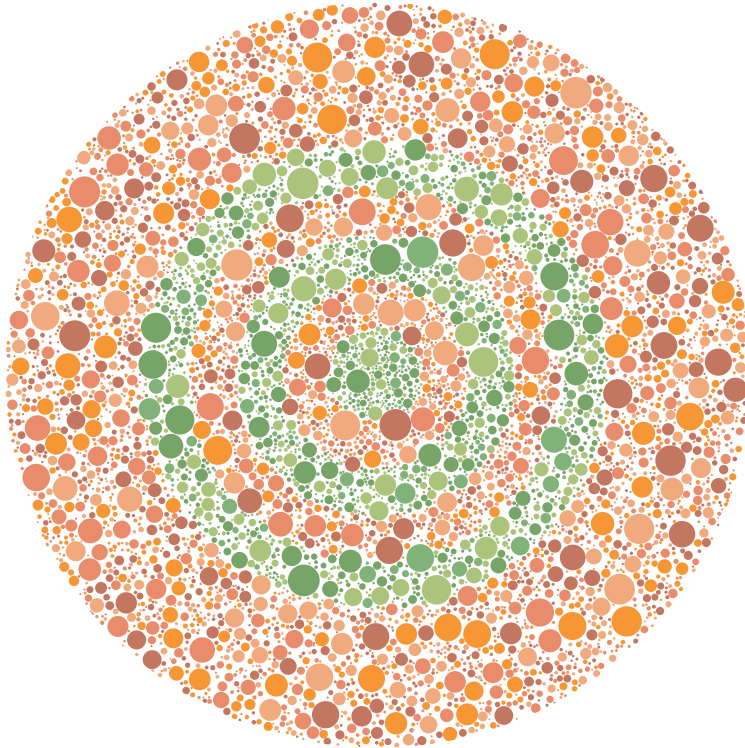
According to Blades, some global clients haven’t been able to do the foundational work needed to create a broader context for local research this year.

“At the local level, client teams are much more focused, for obvious reasons, on short- and medium-term changes to their own markets,” says Blades. “Finding value for a global project is often about talking to those locals. If you have good relations with, say, a French client, you can probe for context, you can explore what parallels might be found to other markets.”

How Covid-19 skews local

Globalisation isn’t a one-way street, with trade barriers being erected around key markets and a cultural-identity politics seeping into brand consciousness. Covid-19 restrictions have further focused people on their locality. According to research conducted by Dipsticks Research Group for Posterscope in September, 64%





of respondents said it has made them realise the importance of their local high street, while 50% believe they have created a stronger emotional tie with their local community.

“We’ve seen an even more significant drive towards tighter levels of localisation, partly as a result of lockdowns,” says Ruth Partington. “With public sector work, for example, the need for national governments to work with their local communities in more precise and well-calibrated ways has become even greater.”

A rise in localism has accelerated support for local brands and produce during the pandemic, while platforms and networks have emerged to connect communities in new ways (community Facebook groups, Nextdoor, street-level WhatsApp groups, and food-sharing apps, such as Olio). Understanding how these interactions affect consumer decisions has been a major challenge for many organisations.

“People feel a lot more engaged with how brands behave and what their impact is locally,” adds Ruth Partington. “An issue such as Black Lives Matter feels universal in a brand context – but understanding what it means for someone in Italy compared with, say, Indiana is vital. We have this heightened sense of the importance of understanding people’s fears and motivations against what might seem very universal trends.”

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Covid-19 pain-points are an obvious area for focus. There's a need for granular insights in the healthcare and education markets, for example – sectors in which global trends are filtered heavily by local infrastructure and sentiment. The changes wrought by the pandemic are also forcing providers in those sectors to change more rapidly.

Khan says the pandemic accelerated Pearson's digital transformation. "All the products in our digital roadmap had to be brought forward, and that meant we needed to test the appetite for online learning much more keenly in the wake of the pandemic. At the same time, we also had to shift to almost exclusively online research – and that kind of pivot leaves you with a bunch of questions about methodology."

While some clients, like Khan, have doubts about

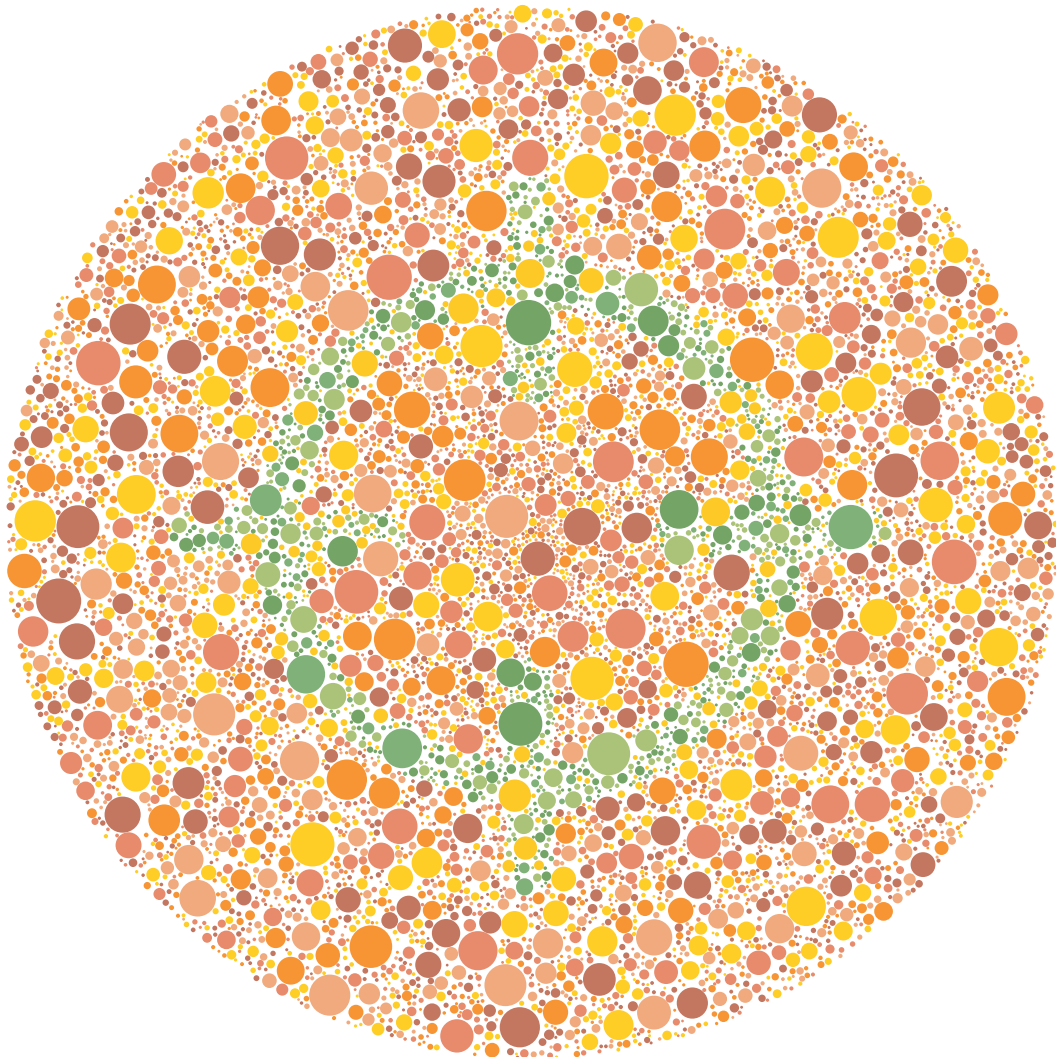
videoconference focus groups and long for a return to face-to-face – partly as a way of sense-checking other methodologies in different markets – the rise of Zoom has broken down some barriers between localities.

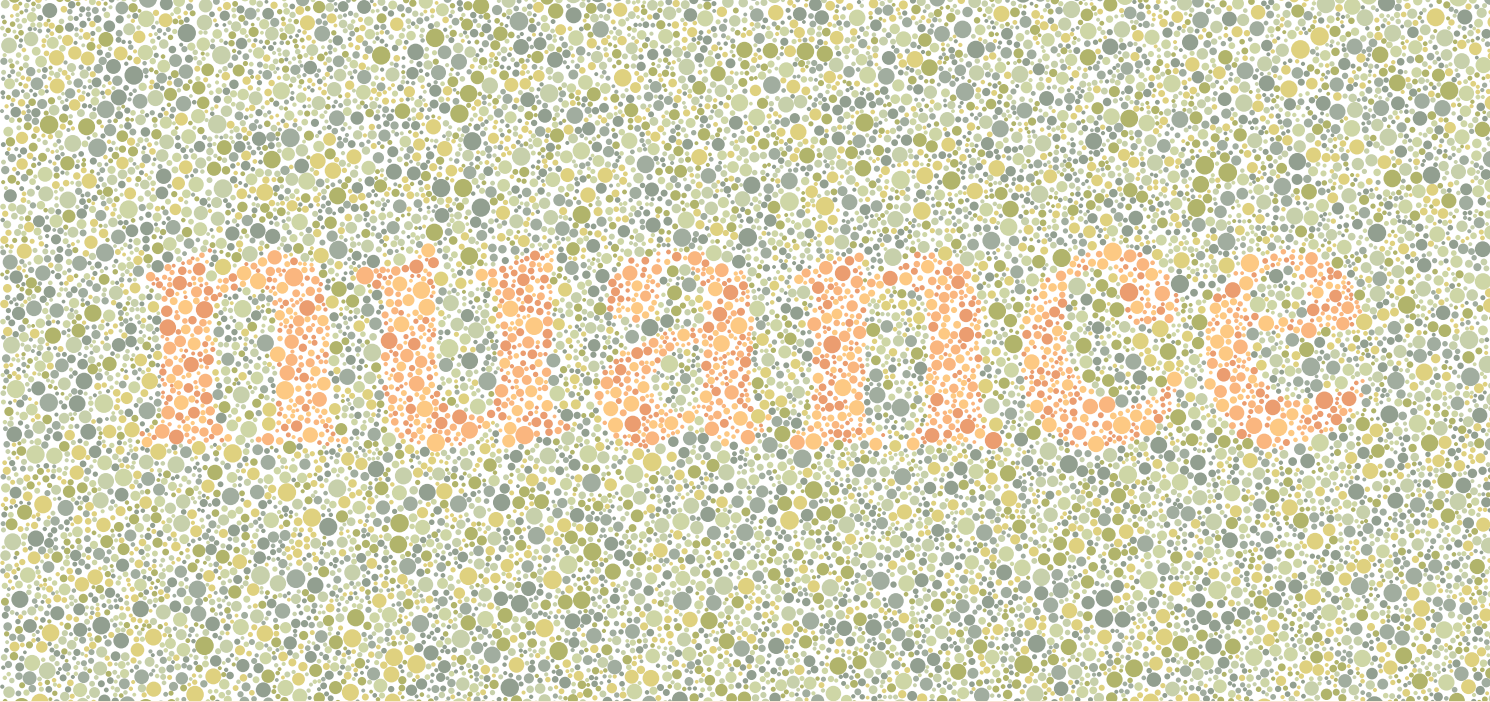
"Same, same... but different"

Everyone we spoke to for this report talked about the risk of using points scales for quant across different markets, and trying to contextualise scores against national norms. (In China, middling scores are positive; in Indonesia, everyone loves everything.)

It's particularly important for large global brands with a set idea of how they approach their brand equity or new product development studies, according to Abulafia. "The alternative is to develop a more organic approach, so that the question set allows you to reflect local nuance. It might be as

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"Having a local panel provider means you can get speed into those projects without sacrificing quality of insight"
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simple as using a 100-point scale instead of a five-point scale,” she says.

For Pearson’s Khan, sensitivity to local conditions is a balancing act. On the one hand, the product isn’t going to vary all that much, and neither are the core drivers of the audience. Pricing questions are crucial, however.

“Teachers in Indonesia and Minnesota aren’t that different from each other,” she says. “Their basic needs and motivations are pretty similar – at least in the education market.

“But I’ve always been interested in how ‘willingness to please’ varies in different markets. In some localities, it feels like people are predisposed to be positive. Is it respect for big companies? Is it people inflating their spending power – and willingness to spend on education – to feel good? Would they really buy at the price points they suggest?”

Just because local research might be tailored, that doesn’t make it irrelevant to a global strategy. “It requires you to ask, carefully, can we translate local insights into a general picture?” says Blades. “Can you take insights from one country and ask how it might help you in other cultures? Does it show you where you might tweak methodology in that other country to uncover similar insights? If you can validate against your understanding of the other markets, it can be a valuable tool.”

Technology does hold out the hope of refining that global/local tension. “We try to build a standardised core and flexible outer,” says Zappi’s Phillips.

“With a tracker, you have a module that’s standardised and comparable across all markets, then there are optional modules to bolt on, and some that are, themselves, flexible within certain parameters. But that’s not always an easy thing to deliver.”

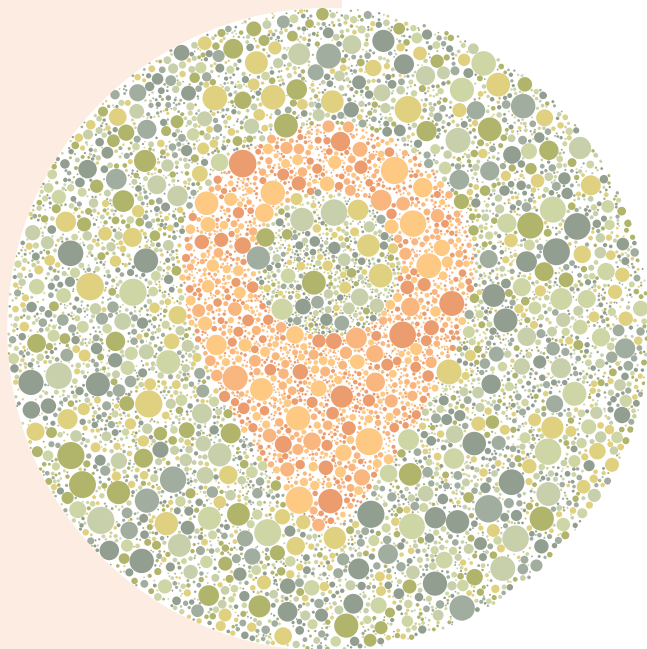
Experience counts

For research teams with a local presence or partners in a country, it is easier to adjust for regional and local variances in scores or emotional reactions. “Having tried and tested partners in place in your key markets is a huge advantage,” says Ruth Partington. “That’s not just about translation – having a local panel provider or community platform host is key. It means you can get the speed into those projects without sacrificing quality of insight.”

Khan has felt that particularly keenly on a project to evaluate a high-end distance-learning package that Pearson is selling into high net-worth Asian and Middle Eastern markets – and given what happened in 2020, speed has been critical. “Traditionally, we’d have sent people out to recruit parents, literally outside the schools that fit the profile,” she says. “That’s obviously not possible with the pandemic, but the online panel providers we use are going to struggle with that kind of specialist target. Luckily, we found one – Rakuten – that specialises in precisely that kind of market.”

This hints at a kind of flexibility that comes with the territory (pun intended) of trusted third parties. “You don’t always need to have a global footprint – you can usually find local people to work with you and build strong local insight that way,” says Blades. “Some would argue it’s a much more agile way of working at a time when that’s increasingly important.”

While working with great translation services is invaluable, Phillips stresses, new approaches open up when you have enough data to control for their meaning, too. “There’s a lot of work looking to explore things such as emoticons or other system 2 approaches, like facial coding, that ought to be more universal,” he says. “The critical thing is to do enough research that you can compare across hundreds of local studies to



Deep localisation of insight: mission-critical or mission impossible?

Starbucks has 31,000 retail locations spanning the four corners of our world. Maybe that’s why I didn’t think twice in Valletta, Malta, last year when I noticed the global chain had set up shop on the historical waterfront.

What did catch my eye, though, was the ‘Specials’ billboard. Its proposition was vastly different from the Starbucks next to our hotel in Sliema, less than a mile away. It had been tailored to a different location, history and, apparently, clientele.

Localisation of marketing on this level is not revolutionary, especially in the highly visible fast-food and drink industry (look no further than McDonald’s), and the pandemic has accelerated this shift by intensifying consumer expectations of brand localisation. Indeed, Hall & Partners’ 2020 People Pulse survey identified how consumers across a number of global markets increasingly penalise brands that do not engage on a local community level.

What is unprecedented, however, is

a widescale reshaping of global research processes to support clients’ increasingly complex localisation requirements across all sectors. Generating insights that are rich enough to inform the increasingly preferred local-over-global approach to strategic decision-making across multiple markets is no mean feat considering the multitude of adjustments required at all levels of research. These include methodology, content, cultural nuances, salary bands, education levels, the gender question, regionalisation and adjusting for acquiescence skew/bias across markets – to name but a few.

In October 2020, Empower held the first insight localisation clinic for global researchers, to have meaningful dialogue around the barriers to generating much-needed, deeply local insights. We identified the luxuries that are not easy to come by in research: more time and more money. Yet, before working with (or

work out where your data lies. Without standardisation, it’s much harder to make comparisons.”

Trying to force hard-and-fast rules for generating or using insight across multiple markets is always likely to fall short. The solution is teamwork, according to Steggals. “Clients know their product or service better than anyone; we know the right questions and methodologies that will get them where they need to go; local teams understand the cultural norms; and the translations can bring it all together. But what decisions can you take off the back of local insight? What research approach is going to shape your decisions?”

What risks are brands taking if they fail to localise? For researchers in the UK, in particular – as they ponder the country’s new role on the world stage – the ability to respond to the whole world’s local issues might be invaluable. “Despite everything, it does still feel like the world is getting more global, not less,” says Blades. “The need for insights on global products, services and brands is still accelerating, especially in the digital space. We’ve never really bettered ‘think global, act local’ as a touchstone.”

persuading) clients to relieve those pressures, research teams also need to decide where the ‘burden of responsibility’ lies for desk research and actions required for deep localisation based on knowledge, skills and process.

During the course of the clinic, we produced several solutions for reshaping global research, including:

- 1.** Strengthening client relationships through expertise and engagement with the end goal of the research
- 2.** Establishing standard operating procedures that make clear from the outset with whom the responsibility lies for various localisation aspects, including desk research and content localisation
- 3.** Developing a centralised demographics catalogue containing salary bands, education levels, and so on, per market, to ease the burden of desk research.

● **Ruth Partington is chief executive of Empower Translate**

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Trust in place

The National Trust is using insight to communicate the value of spaces and connect with audiences in new ways. By Katie McQuater

Recent TV adverts from the National Trust are like a balm for the soul; in one, frothy waves lap a pebbled beach, while in another, a small bird hops across mossy stones. None has a voiceover, instead, all are sound-tracked by the rise and fall of the waves and birdsong.

Connection with nature is perhaps something we've all instinctively appreciated more in the past few months – confined to our homes, many of us have felt renewed vigour from long walks and the benefit of time spent outdoors.

The National Trust has had an idea of nature's healing properties for a while now – the organisation's 125th anniversary advert by creative agency Wieden+Kennedy drew on the 19th century words of its co-founder Octavia Hill: "We all want quiet. We all want beauty. We all need space."

For an organisation dedicated to preserving historic places and spaces, understanding and communicating the relevance of those spaces to our modern lives is a key priority for the National Trust.

"Life is busy and people – no matter whether they are members or not – need to get more in touch with nature," says Christina Finlay, director of data and insight at the charity. "All sorts of academic research shows that nature

has a proper calming effect on us, and over the past 20 years, we've all been getting less and less in touch with nature. All of the work we've done with academics – and our own research – has shown that's a really tangible thing."

It is not only about highlighting the benefits of being physically present in the outdoors – the campaign used natural sounds, such as waves rushing in, to trigger autonomous sensory meridian response (ASMR) in viewers. "When people can't actually get into nature, how can we trigger that same response – especially for people who

things each day, such as smelling a flower, stopping to look at the sun rise in the morning or watching the stars. After a week, participants reported a fundamental difference in how they felt.

The National Trust has also worked with the University of Derby's nature connectedness research group and, in 2018, adopted the group's 'pathways to nature connection' research to inform its engagement activities.

Finlay is responsible for four teams: data and analytics; business intelligence; data marketing, which manages the customer journey; and the

Communicating the relevance of historic places and spaces to our modern lives is a key priority

live in the middle of the city?"

There was a "gut feel" within the organisation that nature was positive, says Finlay, but the insight function sought to validate that, first through neuroscience work with Walnut Unlimited, to explore the link between meaningful places and emotion.

Further research with the audience community, based on the 'five ways to wellbeing' framework, involved asking participants to complete one of 20

insight team, which conducts qualitative and quantitative research.

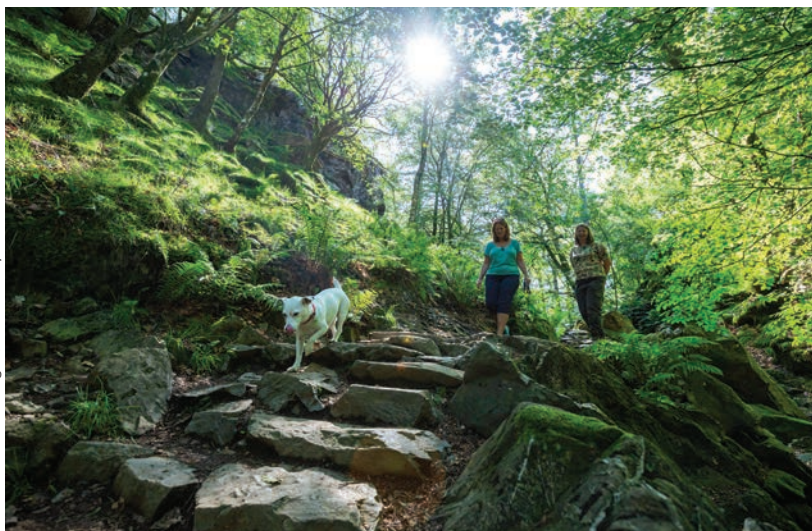
The value of insights to the organisation, in her view, lies in customer experience. "For the customer journey team, we have to see holistically in a way that the organisation can't. The organisation can be a little bit siloed in the way that most organisations are, and what we want is to make sure that the audience has a consistent experience with us."

For an organisation that produces other types of research – it has a large team of volunteers poring over historical documents – alongside audience insight, the two try to work together where possible.

Discussing the research with the University of Derby, Finlay says: "Our intention was to straddle the two – to have the academic rigour but also the commerciality that we could then drive support off the back of; and third, we wanted to drive press."

The trust also recently produced a research report on colonial histories (see boxout) led by its academic status team, which sits separately from Finlay's team and has Independent Research Organisation status.

Finlay says: "It's a difficult story to



Recognising history

In September 2020, the National Trust published an interim report on the connections between colonialism and 93 of the properties within its care, including links with historic slavery.

The report was edited by the trust's head curator Dr Sally-Anne Huxtable, world cultures curator Dr Christo Kefalas, and textiles curator Emma Slocombe, along with Professor Corinne Fowler, University of Leicester.

Data includes the historic sources of wealth linked to slave trades, goods and products of enslaved labour and the East India Company for buildings and estates in the care of the organisation. The report also documents the houses linked to the abolition of slavery and campaigns against colonial oppression.

Dr Tarnya Cooper, curatorial and collections director at the National Trust, said at the time of the report's publication: "It's our job to research, interpret and openly share full and up-to-date information about our places. This includes information about colonialism and slavery where it is relevant. This is part of caring for our properties in a historically responsible and academically robust way. The work helps us all understand what's gone before; now and for future generations."

Some of the research has been used to update the trust's digital content and is being used to inform a review of visitor information and interpretation at certain properties. The National Trust is continuing its research in this area and is also working with an external advisory group to shape future research.

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tell, but we think it's an important story to tell – acknowledging the history of a lot of our houses and the context they were in 200 years ago, as well as now. For so many of our members, history is so important to them, so what we want to do is recognise the context and then what role that plays for us in today's society."

Key values

While the public health crisis has been challenging for the National Trust, most notably with the temporary closure of many of its properties to the public, the insight team did not change its objectives as a result – rather, its existing priorities were brought into sharper focus – the visitor experience, the conservation of properties and conservation of nature. "It's almost like we've hunkered down and said that we need to focus even more on our strategic priorities," says Finlay.

"How do we drive that insight that gets to the heart of what will make people really connect with the organisation? We also create efficiencies, and because I own and work with all of the data, it's about how can we make data much more efficient, so that everyone can look and see the same thing, which in many organisations can be quite hard."

For example, the function has put into place a new segmentation driven by qualitative and quantitative research. "We fed that through into all of our data-driven insights so that everybody

in the organisation can see the same segmentation of the audience, and now, every time we do qual, that feeds into that segmentation and we have one version of the truth,” says Finlay.

At a time when many of its houses remain closed, a key challenge for the National Trust has been focusing on the value of its membership. “The biggest thing for my entire team is how we can help the organisation to connect in deeper ways with our audiences so that they want to maintain their membership while we’re going through this tough time and they can’t necessarily visit as often as possible.”

During spring, the insight team subscribed to a tracker run by Kokoro (which runs its brand tracker) and produced a weekly report on how the nation was feeling, which was sent to the executive team.

When the trust began reopening some properties, insight from that was used to help inform how it went about the process. Safety was the main issue, but it was important for people to understand what measures were being taken and how it was being done.

How would Finlay summarise her

team’s approach to customer experience? Focusing on the fundamentals. “We have a phrase we use in the insight team: ‘Don’t put a mint on the pillow if the sheets are dirty.’”

“A lot of the properties might spend time on amazing events, but the most important thing for visitors is that the car park is easy to navigate, the toilets are close and clean, there’s no litter about, that kind of stuff,” says Finlay. “If you’ve got dirty sheets, that makes people feel like the good stuff isn’t that good.”

The organisation has more than 500 properties and the insight team uses Tableau as a tool to share insight with general managers about what steps they can take to improve their service.

“Tableau allows us to scale our qualitative and quantitative research data,” says Finlay. “For example, we have a segmentation and our third-party data tells us that around a certain property, within a 10-minute drive time or a 20-minute drive time, there are these types of people, so therefore for property A, these are the things that are going to be important to your

audiences. It’s our way of scaling everything we do.”

In addition to merging its qual and quant research with other data, natural language processing is another area of focus, and has two purposes for the trust, according to Finlay.

“The first is text analytics – we get a lot of qualitative research and we run a continuous survey, so we have a lot of text that we want to analyse and the data science team is working on a programme.

“The other application – because we are in an organisation that is not quite so data-literate – I would like is for people to be able to ask a natural language question and be able to get the insight they want. For example, our director general typing ‘what were visitor numbers at a certain property last weekend?’ into a search bar, and a chart popping up. That, for me, is the speed and ease at which I would like insight to get out to the rest of the organisation.”

Editor’s note: Christina Finlay left the National Trust prior to publication of this article

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“We have a phrase we use in the insight team: ‘Don’t put a mint on the pillow if the sheets are dirty.’”





Best foot forward

Dr Martens has a long history of identification with subcultures, but insight is helping the brand to keep its solid footing for the future. By Liam Kay

Whether it's a punk pogoing at a gig, a goth striding into a local bar or a guitarist stepping out on stage, Dr Martens has been a staple footwear of many subcultures in the UK in recent decades. The iconic brand celebrated its 60th birthday last year, and continues to be a prominent presence on today's high street.

Despite its unique look and devoted fanbase, Dr Martens is always looking to stay relevant for a new audience, and insights and market research help keep it on the front foot.

Michelle Faure, head of brand strategy and insights at Dr Martens, leads the company's insight function. She heads up a team of two others, including a strategy director who sits on the company's global leadership team.

The team has not always had insight in its remit – it adopted the discipline

18 months ago, after a request from the company's chief executive, having previously been focused solely on strategy. "We used to do a bit of consumer research within our marketing department, but there wasn't an all-seeing insight function," says Faure.

"Starting life as pure strategy meant we circumvented many of the issues I hear so often from counterparts in other businesses, such as struggling to embed insights into the organisation or to get time with senior stakeholders.

"For us it's the total opposite. Because we, alongside other functions, get to set the 'question' and then answer it, we are very clear on our priorities – we know exactly the impact it is going to have and we don't struggle to push anything through."

The challenge has been building a foundation of knowledge on which to base future strategy. This is a big task,

says Faure, but the team is small, agile, and has the backing to do it.

The team works closely together and with different functions across the company, particularly the chief product and marketing officer, the global leadership team, and the marketing and product departments.

“We rarely do anything in isolation,” Faure says. “Designing projects and answering the questions we want to answer will always be done hand in hand with the other main department we are working with. We run the project with them, co-create the answer, and work with them through the implementation. We have this unofficial extended team that goes throughout the business.”

Accessibility

As a consequence of its origins as a strategy department, the insight team is primarily focused on the medium to long term – hence the focus on building a knowledge base to understand the current status quo in retail and fashion. This is used to inform major strategic decisions, as well as how consumers perceive Dr Martens.

The first big project is focused on renewing the brand definition, including Dr Martens’ purpose, values, the causes it supports, its target customers and how it communicates.

“For a company that has been around 60 years, it is quite a scary prospect,” admits Faure. “Rocking the boat with a brand that means so much to so many people feels monumental. It feels poetic that we are doing this on our 60th birthday.”

This refresh of the brand definition includes being more willing to showcase its alternative values and speak up on important world issues, according to Faure.

“It is no longer OK to be that passive brand that says ‘we do the boots, you do the rest’. We need to show up to the party.”

Adopting values is the easy part – embedding them in the company’s culture is a different matter. Faure explains that the insights and strategy

“Rocking the boat with a brand that means so much to so many people feels monumental. It feels poetic that we are doing this on our 60th birthday”



department wants to avoid becoming a “bottleneck” for information, so it has created a user-friendly dashboard to make that desire a reality and to make data accessible across the company.

Produced internally, the dashboard is updated quarterly and can be viewed by everyone. It contains all the company’s insight data, including consumer profiles, surveys from 14 markets and people’s views of rival brands.

To promote the dashboard, a roadshow took place across every department to show them how to use it and interpret the information available. More than 100 hours were spent in the workshops, which were mainly held online because of Covid-19. Follow-up workshops will be held annually.

“That was a dramatic shift for everyone, no matter what department you are in, to have access to that data,” Faure says. “We are not precious about sharing data. Only good things can come from everyone



having a bit more knowledge. People can have conversations about insight now as we have taken the time to do something thoroughly and well. Sometimes, we have to remind ourselves how lucky we are to be starting a department from scratch, as you can design it how you want.”

Once the work on brand definition – which is being done in partnership with cultural insight agency Sign Salad (see panel, ‘Rebelliousness rebooted’) – is complete, the focus will be on segmenting the company’s customers and distribution channels. The hope is for the business to use this segmentation as a springboard to be bolder – for example, ensuring stores are able to meet customer expectations.

Shifting direction

Dr Martens also works with several external insights and research agencies, including with its panel provider Toluna on a quarterly survey, with Select Statistics on consumer segmentation, and with UM on marketing.

In addition, the team runs a lot of

one-off projects with agencies. The company is working with Simon-Kucher & Partners on pricing, featuring a survey and qualitative focus groups to understand consumer opinions on value for money and price limitations.

Savanta, meanwhile, is working on a project looking at the brand’s in-store experience, which has led to alterations to how products are showcased on the high street. The research focused on Dr Martens stores in Japan, the UK and the US using a mix of conscious and non-conscious techniques – including observation and exit surveys.

Cultural consultancy Loud has worked with Dr Martens on a project around cultural consciousness, and studied the growth paradox, whereby companies try to retain their original values as they widen their appeal. This resulted in a ‘boot room’ being built within Dr Martens’ flagship store in Camden, London, which produces experiences, videos and audio to engage a range of local and global communities, and to feed into Dr Martens’ campaigns.



There is also the ongoing project with Sign Salad, to evolve the company’s branding and ‘rebellious’ image (see panel).

Faure says there is pressure on the company from its traditional fanbase – particularly with such a distinctive product – and the desire to keep the brand moving forwards into the future.

“It is a challenge, in that people are so passionate about this brand, internally and externally,” she says. “There’s a lot of pressure to not mess with the gem.

“Equally, it is really important that we make sure the brand is still standing for what it stood for, but in a way that is relevant and meaningful in today’s climate. It is trying to bring the magic of the past into something that’s meaningful today.”

The decline in music subcultures poses both a threat and an opportunity. Whereas Dr Martens was once – and still is – beloved of alternative music scenes,



“In really scary times, people return to the brands they know and love, and that have heritage”

such as punk or grunge, today’s music industry is much less homogenous. It remains a household name, however – which has been helpful in maintaining sales and brand presence during Covid-19 – and it is seeking to tap into a younger generation more willing to experiment with their style.

“In really scary times, people return to the brands they know and love – the brands that have heritage and evoke feelings of nostalgia,” Faure says.

“Subcultures today are not what they used to be – they barely exist because of the fluidity in how people express themselves. I might dress like a punk one day and dress in a suit the next, and that’s OK. My expression is not boxed up.”

Rebelliousness rebooted

Dr Martens’ work on brand definition was done in partnership with semiotics and cultural insight agency Sign Salad. It conducted a semiotic analysis of Dr Martens’ branding and culture of “rebellious self-expression”. The reason for doing this, Faure says, was to see if the term resonated with today’s consumers in the same way that it has with previous generations.

“We have this incredible history, heritage and past, and subcultures really put our brand on the radar and made it what it is today,” she says. “That is something that should be celebrated, but our brand is so much more than that. The work we are doing around our brand definition will help to articulate who the consumers are we want to target.”

Sign Salad visited the UK, the US and Japan to explore bookstores, recreation spaces and cultural institutions, as well as drinking and eating establishments. It analysed advertising, packaging and products to decode how rebellious self-expression is constructed across cultures.

The results identified residual (past), dominant (mainstream) and emergent (future-facing) cultural codes, together with the visual and linguistic cues of each. Sign Salad defined what ‘rebelliousness’, ‘the self’ and ‘self-expression’ meant today, and mapped out the codes into which Dr Martens fits.

Cultural consciousness has been a priority for the company since the research, and giving teams a common language and frameworks through which to describe and analyse their work. This has been adapted for new Dr Martens projects and concepts – for example, genderless store layouts are being trialled in a few locations, while the company is looking at how ‘rebelliousness’ can be discussed in China in a way that is authentic to the brand and local market.

A question of bias

An experiment from Google and The Behavioural Architects sought to establish how online shoppers make purchase decisions. Liam Kay reports



Releasing a new product is always fraught with risk. Will consumers buy it? Will it challenge competitors? And will it be able to maintain its market share in the long term? Traditionally, the purchase funnel has been used to explain how people shop: awareness of a product or service; interest in the type of product; desire for a particular brand; and taking action to purchase it. But does this model fit online shopping?

Google and The Behavioural Architects worked to update this business model for the 21st century, to understand what consumers considered when they searched for a new product. The aim was to see how those decisions could be influenced and what techniques companies should consider using to help consumers make the right decision.

Alistair Rennie, research lead at Google, who helped lead the project, says the tech giant has seen search data identifying changes in how people shop online. “The internet is no longer a tool for comparing prices – it has become this tool for comparing everything, as people no longer want cheap, they want the best,” he says. “That inspired us to think about what ‘best’ means to someone – it might mean best performance, value, quality, most popular or all of those things.”

To explore these changes further, Google and The Behavioural Architects decided to investigate shoppers’ behaviour in real life. They collected screen-capture video and audio of shoppers in action, with participants asked to provide a “stream of consciousness” of their thoughts and emotions over video, which was then analysed by The Behavioural Architects.

This led to the creation of a model of how people

make a purchasing decision – what Rennie calls the “messy middle”. The model starts with a ‘trigger’ for a purchase and ends with the acquisition of a product. In between, an infinity loop swirls constantly between two concepts: evaluation and exploration. “It’s symbolic of the infinite potential of the choice, but also a nice way of representing the cyclical relationship between the two mental functions,” says Rennie. “It was an elegant solution to the issue of how you demonstrate the non-linear complexity of decision-making without making a complex model.”

Once Google built the model, the team prioritised six key biases that influenced shopping decisions the most:

- 1) Category heuristics – mental shortcuts that help us to make a quick and satisfactory decision within a particular category. For example, when buying a camera, people will focus on the number of megapixels it has to help streamline their decision and reduce the amount of information influencing the purchase.
- 2) Authority bias – the tendency to alter opinions or behaviour to match someone considered to be an expert in the subject, such as an economist or a scientist.
- 3) Social proof – copying the behaviour and actions of other people in ambiguous or uncertain situations, such as following reviews or four- or five-star ratings.
- 4) Power of now – people want to have things immediately, rather than waiting for them. For example, instant downloads or 24-hour delivery.
- 5) Scarcity bias – the rarer the item, the more desirable it becomes. This could be either time

limited, quantity limited or access limited.

- 6) Power of free – demand for products is greater at £0 than almost any price above it.

The Behavioural Architects and Google then tested those six biases with consumers. To do so, they created a shopping simulation, with shoppers asked to share their first and second favourite brands from a selection within a specific category. Consumers then accessed a site displaying each of the brands' logos and supplementary information. The supplementary information was changed to reflect the six biases. In total, 31,000 shoppers were involved, with 1,000 people recruited for 31 different product categories, ranging from whisky to car insurance. The participants were online shoppers who had recently used Google and Amazon to browse products and not yet completed a purchase. The researchers found that deploying the six biases, either individually or all together, led to a switch from the first to the second-choice brand.

To further test the effectiveness of the biases, the team created a fictional new product and set it in competition against established brands. "We took the brand away, made a product up and saw how it did," says Rennie. "We weren't expecting to disrupt preferences the way we did."

The fake products were priced at the market average, as price is a major driver of shopper behaviour outside the control of behavioural science. The team found that when the fake brand was "supercharged" – meaning it had all six biases applied to it – it was able to attract customers who previously opted for their first-choice brand. For example, the first-choice mobile phone

brand had a 72% market share. This reversed in the study when the second-choice brand was "supercharged", and the fake brand was even able to gain 50% of the market when all six biases were applied.

Rennie acknowledges that the fake product had the advantage of not needing to be created and marketed in reality. But he says the results show how brands could seek to gain – or retain – market share by understanding more about how their consumers shop.

"When people have so much choice and information, it is about understanding what is really important to a shopper when it comes to making a decision," he says. "If you really understand the customer, you can help them make a really efficient decision. And by making an efficient decision, you should end up with some really efficient marketing."

For businesses, the model is a starting point to adapting their marketing, with the aim of securing a greater share of the market or cementing existing hegemony. But Rennie says this should be done with the consumer in mind. The research highlights three implications for brands: to interact with customers while they are evaluating and exploring potential purchases; to apply behavioural biases to give shoppers the information and reassurance they need to complete a purchase; and to optimise site speed, user experience, and onsite messaging to shorten the distance between trigger and purchase.

"The best way for a brand to build value from this insight is to use it to help shoppers and consumers," Rennie says. "We firmly believe if you get that right, it is a win-win – more effective decision-making, and more effective marketing."

"If you really understand the customer, you can help them make a really efficient decision"





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Hiding in plain sight



Global markets were down at the end of October, the worst month since the low point in March, because of renewed fears of a second wave and its economic impact on jobs and growth, aside from the unquantifiable human cost.

Why were the markets surprised? The World Health Organization (WHO) had already warned, once it declared Covid-19 a global pandemic on 11 March, that it would probably last about 18 months. This forecast was extrapolated from the experience of the Spanish flu, which lasted two years (1918-20), but also took into consideration the advance of technology and human development in the ensuing century.

Similarly, the Federal Reserve warned in early summer that the path of the economy would follow the path of the pandemic, which was uncertain and unpredictable. So, no surprise there either. Yet the markets were spooked and startled. Go figure, as they say Stateside.

At the top of every cycle, investors talk of a new ‘paradigm shift’, which tries to explain why ‘it’s different this time’ – the four most expensive words in the investment lexicon. But is it ever different? In 1987, the land on which the Imperial Palace in Tokyo stands was valued at more than the real estate of the whole of California, then the world’s sixth-largest economy. That is, until the bubble burst and, more than 30 years later, Japan is still playing catch up.

Similarly, in 2000, Microsoft and the dotcoms were valued at more than the gross domestic product of the whole of the Indian subcontinent. In 2020, Microsoft is still up there with the best of the FAANGs (Facebook, Amazon, Apple, Netflix, and Google owner Alphabet), but India has far outstripped and overtaken all the bust dotcoms. No surprise there, really.

In 2020, Apple was worth more than the whole of the FTSE 100 index. How can that be? Well, Footsie’s biggest constituents – the banks and oil and resource companies – have been hit hard by a perfect storm. The market is concerned about the level of the banks’ bad-debt provisions, the impact of low

interest rates on their business models, and the regulator withholding their dividend payments. The latter point makes them ‘uninvestable’, effectively.

Meanwhile, the oil majors have been hit by the impact on demand of the pandemic, low oil prices, and the move to low-carbon fuels. What’s the bet that these stocks stay low and Apple high over the long term? Place your bets, or as they say in Monte Carlo – the home of shady characters in sunny climes – *faites vos jeux!*

Our lives are heavily influenced by a handful of technology companies and their monopoly is no secret. The FAANGs, along with Microsoft, now dominate the US stock market, and account for 25% of its capitalisation and the vast majority of its performance. But how influential, exactly, are these companies that we all know are influential to everyday life? Very, according to a report from the US

subcommittee on antitrust law.

What is the remedy? Probably breaking them up, I would wager, and – counterintuitively – probably creating even greater shareholder value. If, say, Google was to spin-off YouTube, it would attract fresh capital that would be allocated exclusively to growing and expanding

YouTube’s footprint, with all the attendant benefits and profits accruing to YouTube alone, to be redeployed to fuel further growth. A virtuous circle.

Don’t believe it? Look at Ant Group – formerly known as Ant Financial and the owner of Alipay – which was spun out of Alibaba Group in 2014 and valued at ‘only’ \$45bn in 2015. Ant Group was due to undertake an initial public offering (IPO) in Shanghai and Hong Kong in early November, before the listing was dramatically suspended and delayed because of changes in “the financial technology regulatory environment”. It had been oversubscribed by 870 times by retail investors, and raised \$37bn, valuing it at about \$316bn. This would have made it the biggest IPO in history and left the holder of that title, Saudi Aramco, in the shade. Now, that is a surprise. As they say, data is the new oil.

●
“At the top of every cycle, investors talk of a new ‘paradigm shift’, which tries to explain why ‘it’s different this time’ – but is it ever?”
 ●



Invisible unknowns

A study of online conversations about health and wellbeing has helped map the scale of the data gap affecting women.

By Katie McQuater

Women are 50 per cent more likely to be misdiagnosed after a heart attack because they have different symptoms to men, while, on average, they receive a diagnosis for diabetes 4.5 years later. For women suffering from endometriosis, it can take an average of 7.5 years to be diagnosed.

There are still glaring inequalities when it comes to the health of women – in how it is understood, discussed and treated.

Caroline Criado Perez's book *Invisible Women*, published in 2019, laid bare the problems caused by a lack of sex-disaggregated data, from heart attacks being misdiagnosed to car-safety systems not taking account of women's measurements.

It is one thing to recognise that an area of health

needs more research, investment, solutions and awareness, but another to identify exactly what the needs are within that. This was the issue facing the Health Tech Hive, a network of policy-makers, entrepreneurs, engineers, academics and competitors, set up with the aim of building technology solutions to health challenges.

Established in response to what co-founders Jasmine Eskenzi and Brigitte West saw as an increasingly siloed health-technology space, the group focused its attention on women's health as a key challenge because of a general awareness that there was a "massive data gap", says Eskenzi. "Men's bodies are seen as the status quo. It's time we changed this."

While the existence of a data gap was known, however, the scale of the gap – and the conditions and issues affecting women as a result of it – were unclear. So, the Health Tech Hive partnered with Discover.ai to conduct research on the topic.

They used artificial intelligence to undertake a qualitative analysis of a range of online sources of conversations between women, including forums, social media, advice columns and blogs. The research combined language from 251 sources across 19 sourcing areas and two markets – the UK and the US. It aimed to uncover cultural insights and stories that would examine the unmet needs in the area of women's health, and identify target areas for future research and strategies.

An academic literature review would not have worked for the purposes of identifying what the invisible needs were, for the simple reason that there is not enough existing research. "You're trying to work out what people haven't been doing research on," says Hannah Marcus, strategist at Discover.ai.

"We thought that by going to these online spaces where people are choosing to talk about what's happening to them – that might be in a health space or an adjacent space – we'd get spontaneous and unmoderated stories and voices across different online spaces, and see how we could bring them together."

The analysis drew insight from some surprising places. "Goodreads is an interesting source of data. If you've got a book talking about a data gap, such as *Invisible Women*, a lot of people's reviews will talk about why it resonated with them and their experiences. Suddenly, you've got this spontaneous response to a text, and we tried to capture a lot of it."

For a subject matter as broad as women's health, managing the potential scale of the project was challenging, says Marcus. There were multiple possible areas on which to focus, and the research needed to be as comprehensive as possible without being overwhelming.

"We had some quite interesting conversations about how much we should talk about cancer, for example," says Marcus. "That's obviously a very big area, but also one that has research and funding. It's not as completely unresearched in the same ways."

Birth control was another topic that came under scrutiny, says Marcus. "That is a real area of tech innovation – but not a condition in and of itself."

In the end, the research had two areas of focus. First, the needs specifically affecting people with

women's bodies, including conditions such as endometriosis, perimenopause, menopause and polycystic ovary syndrome, as well as issues such as fertility – including miscarriage – vulvic pain, thrush and sexual pleasure.

The research also flagged conditions that affect everyone, but for which the impact on women is under-researched or unknown: noncommunicable or chronic diseases (NCDs); heart disease; osteoporosis and joint conditions; auto-immune diseases; diabetes; weight; incontinence; cognitive decline; Covid-19 and mental health.

Discover.ai mapped these issues against what it termed 'macro causes' – eight hypotheses for why gaps exist in data. These ranged from women being disbelieved by medical professionals and the way in which pain is considered in women, to the assumption that women are 'small men' and that any data already held is sufficient.

Following the research, the Health Tech Hive is working with various investment groups to assess the current gaps in investment and identify where quality is lacking, in terms of health technology, around the various health needs.

"It might be that there is no funding going into a particular area, or that there is a massive gap in the academic work," says Eskenzi.

The initiative also hopes to work with more partners to create working groups around each of the areas identified within the research. Eskenzi was struck by the scale of the issue.

"We had known this was a big problem, but this was not a clinical tick-box study; this was going into forums and [gathering data on] what is being spoken candidly about among women.

"There is just so much we need to do. We really need to take this research and scream it from the rooftops that there is a massive issue here. We need to put funding behind it; we need to put minds behind it – we need to address it.

"Women have been dismissed by so many doctors, been told 'it's part of life'. It's been far too long that women haven't been heard."

Energy levels

A new data model aims to identify areas of fuel poverty in London and tackle the city's energy inefficiency. Liam Kay reports

Climate change is one of the world's most pressing issues, particularly the need to reduce carbon footprints to bring global heating under greater control. Around 22% of the UK's carbon emissions come from our homes, according to the Energy Saving Trust, and data can be used to help promote energy efficiency in our properties, reduce carbon emissions and inform government environmental strategies.

To do this, the data needs to be accessible and comprehensive. Steve Evans, senior fellow at the University College London Energy Institute, helped design the London Building Stock Model, which aims to provide energy usage data in an easily digestible form.

The model is designed to show the energy efficiency of every building in London, explains Evans. This can then help authorities understand where improvements are required, and which areas of London struggle the most with energy efficiency and fuel poverty. "If you don't know what the current situation is, you have nowhere to start from," he adds. "In a way, this model is a 'base case' for what has got to be improved upon."

The model was commissioned by the Greater London Authority (GLA) as part of the city's attempts to become zero carbon by 2050. Designing the model took two years, and it is accessible to the public. A more comprehensive version is available for the GLA and other organisations that require access to it.

It works by showing an interactive map of data on every domestic and non-domestic property in all 33 London boroughs. This includes the age of buildings, as well as their proportions, construction materials, servicing systems, and the nature of activities on each floor of commercial and public buildings. Each building also has an energy efficiency grading. The model can then show how energy efficiency is improving, stagnating or declining in the city, and where pockets of fuel poverty exist.

Building a 3D model of every building in London was complicated, Evans says. The current approach is based on Ordnance Survey data, information on business rates, Environment Agency data on flood risks and information from the Land Registry. Energy performance data and display energy certificates, published by central government, are also used to show which buildings have roof insulation, how they are heated, and whether double glazing is in place, among other things. The model shows much of London is mid-terrace, pre-WWII, with a grade D environmental rating and lacking double glazing.

"Once you get to this point, you have a lot of data – that's not necessarily what some companies would call big data, but it is pretty complex and difficult to manage easily," says Evans. "But the key thing for us is it all pulls together on a map – it works together spatially. The sum is far greater than the individual parts in what we have created."

The scale of doing this project for a city of almost nine million people is challenging; one of the big issues, Evans says, is the diversity of London's buildings, with businesses, flats, Victorian terraces and modern apartments often co-existing in similar places. "Buildings can be very mixed in their use," he adds. "Sometimes, in new developments, this is intentional, but for many parts of London this is economic forces at work, as people convert houses into flats or rent above a shop. This makes it difficult for us to categorise a building as a whole."

There was also the trouble of aggregating the data – showing, for example, the energy rating for an entire block of flats as well as the individual buildings.

Additionally, only a third of buildings in London have an energy performance certificate (EPC), so the team had to predict EPC ratings for houses by comparing them with similar buildings.

There has been interest in the model from other world cities, as well as towns and cities in the UK, Evans says. The team is working on a separate solar potential 3D model of London, to help identify where solar panels could be encouraged, and further alterations to the housing stock model could uncover additional data.

"With the climate emergency, there's a realisation that tools such as this are really needed to focus our efforts," adds Evans. "Years ago, there wasn't the data to do this sort of thing, but there is more data sitting in central government that would make the model better. We're hoping it will engage the public with what needs to be done to improve the energy efficiency of buildings."

Driving the data agenda



I engaged in a very interesting debate through LinkedIn recently, relating to a job advertisement for a director of analytics. I loved the discussion because it was centred on the capabilities required to take on a leadership role in data-based analytics. It caught my attention because it reflected one of the personal questions I challenge myself on – namely, how analytical do you need to be to lead in analytics?

I have spoken to colleagues and industry friends on this topic, because it is easy to feel like an imposter in analytic circles. The ability to go deep into Python, write algorithms or code, and even do the basic stuff such as advanced Excel manipulation are all out of my reach without giving more time to learning and deeper understanding. I am not afraid of learning new skills, but I don't think it is necessarily what an analytic leader needs to drive the data agenda forward and deliver results through analytics.

The primary ability for a leader of any analytic function in a business is to show the value from the work that is being created and how it fits with business success. We don't need all the detail to drive great teams. What we do need is the ability to see how data fits into strategic goals and how we can build a strategy for analytics that complements the business objectives.

One of the essential tasks of an analytic leader is storytelling inside our business. We have to fight for the budget for our data and the teams that will drive impact in the organisation. It is at this senior level that we need the 'data story' to be heard, by showing a return on investment – but we also need to keep it simple.

Our voice is heard loudest when senior executives who really get the value of data are at the centre of the decision-making process. Ensuring a return on investment is crucial to win hearts and minds, but we can help by creating a connectivity to our work. Making the outcomes feel real is crucial to analytic leadership. Tell your stakeholders how they, as individuals, would benefit from your

team's work and output. If we need to explain the details of complex work, we lose the audience – just think about how often we are asked to speak in layman's terms. Highlight the value of the data, but do not get lost in the detail of the latest artificial intelligence solution or new neural learning when pressing our case.

Our role is to look broadly at our industry, to take a step back and see the range of innovation that is coming. In doing so, we ensure that we are not falling behind. One of our strengths as a business function is the ability to show how we are keeping our organisation across the most exciting technological developments. There is so much to say in our field, with developments coming through continuously.

We do need to benchmark ourselves regularly through our formal and informal networks on what is going on elsewhere. I, like others, try to ensure that we have a flow of analytics that

might be deemed business as usual, but is delivered alongside newer capabilities that we want to test. This is where we can create energy inside our business but make sure it is about results and not a 'nice to have'.

There is a key watch-out that the leadership community cannot escape as we try to create a compelling story for analytics. We do need the experts

around us. We need to invest in expertise and to give those teams the opportunity to grow as individuals. Where we see great work we should shine a light on the teams internally and externally, and give them the credit for advancing the business. Connecting our teams to the new stuff is part of the engagement process to let them learn, grow and to address any concern over change. Demonstrating to our teams the bigger picture of the business is vital to make the link from their work to the company mission, and how we contribute to success.

If we work on and develop these parts of our leadership roles, we will continue to grow the visible impact of the industry, driving the investment that makes us essential – and all without needing to be functional experts in absolutely everything.

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“Our role is to look broadly at our industry, to see the innovation that is coming. In doing so, we ensure that we are not falling behind”
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New hope

Anxiety can make people more likely to buy a new product – but only if they also feel hopeful, a recent research paper has found.

By Katie McQuater

If we want something positive to happen, the chances are we have a few butterflies in our stomach about how things will pan out. In fact, if you aren't anxious about something significant, one might surmise you don't really care about the outcome.

When it comes to buying products, marketers may think anxiety is the last thing they want to be associated with their product. However, a new paper from Imperial College London explores the link between hope and anxiety in the context of product adoption, finding that people who experience strong anxiety about purchasing a new product – but who also feel hopeful about its potential to fit their goals or expectations – are more likely to buy it.

In the paper, the researchers make two hypotheses: that consumers' intentions to adopt a new product are greatest when hope and anxiety are both strong; and that people's 'action planning' and perceived control over product outcomes mediate the effects of strong hope and anxiety on new product adoption.

"Hope is a positive emotion studied in the marketing field, but we found that, when we have strong hope, we also have ambivalent feelings such as anxiety," says Yu-Ting Lin, teaching and research associate in marketing at Imperial College Business School, discussing the background to the research.

"For example, with a cosmetic service, when we have a strong hope that we want to become more beautiful, at the same time we also have agitating feelings about whether we should go ahead or not. In reality, many people still go ahead, so we felt that this phenomenon was intriguing."

Future goals

The first field study, sponsored by the Bill & Melinda Gates Foundation, tested the researchers' first hypothesis in the context of health – examining the intention of respondents to adopt a medication called 'pre-exposure prophylaxis', designed to protect people from contracting the human

immunodeficiency virus (HIV) and acquired immune deficiency syndrome (Aids).

Ipsos Mori gathered the data for the study with respondents in eight countries who were deemed to be at high risk of contracting HIV/Aids. Participants were given a description of the medication and asked about their feelings about it, as well as their willingness to use it. The researchers differentiated anxiety from other emotions by including questions about fear of contracting HIV/Aids and whether they would find it embarrassing to take the medication. They found that feeling anxious about the health consequences of the medication modestly correlated with both fear and embarrassment.

The more participants hoped that the medication would offer 'goal-congruent' life outcomes – that is, be conducive to a goal they want to achieve – the more positive were their intentions to adopt it. As feelings of hope grew, stronger anxiety also had a positive impact on people's intentions to adopt the drug.

In the second study, researchers surveyed managers attending an executive education

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Strong feelings of both hope and anxiety led people to consider how to achieve the outcome they want
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programme at a university about a real-world skin-peel product.

Participants were asked to read fictitious social media comments, ostensibly from two product users, about its potential outcomes. One was focused on goal-congruent outcomes (clear, beautiful skin) and another on goal-incongruent outcomes – for example, negative skin reactions.

The researchers created four versions of the ‘social media comment’ to evoke either weak hope, strong hope, weak anxiety or strong anxiety. Participants were randomly assigned to one of the four conditions and then informed that they could receive \$4 as compensation, which they could use to buy a sample of the product at the end if they wanted.

A third study was conducted to determine whether the effects were replicated with another product – an energy drink – and by inducing feelings of anxiety via product disclaimers and social media comments.

Carried out with postgraduate students, the study again asked participants whether they would like to purchase a sample – this time after they had read advertising disclaimers about the energy drink’s potential side-effects and purported online reviews.

Lin says: “We were most interested in products

where there is a possibility for people to yearn for something. We mostly looked at products where people expressed strong desires or hope in the first place, but where there was also room for anxiety to co-exist.”

The researchers found that strong feelings of both hope and anxiety led people to ‘action plan’ or mentally consider how to achieve the outcome they want from a product while avoiding consequences that cause anxiety – for example, reading usage instructions carefully or asking friends. This planning could lead to increased feelings of control and, therefore, improve new product adoption, the research suggests.

Implications

If consumers are known to be anxious about the potential outcomes of new products – for example, the side-effects of a medicine – there is an opportunity to build on that, according to the researchers. Lin says: “If market research reveals that consumers have strong anxiety about outcomes from new product adoption, our research informs current practice that, rather than downplaying anxiety, marketing communications might position the product or service offering around strong hope – that is, important, desirable outcomes from the new product are possible.”

Conversely, if research shows that people have strong hopes for a product, but low anxiety, marketers could provide information designed to heighten anxiety about potential outcomes of adopting the product – for example, by adding warning labels or disclaimers.

This is not about frightening consumers, however. “When anxiety is alone, our human intuition is to avoid this threatening stimuli, so they wouldn’t want to pursue the product at all – but, when hope kicks in, the negative impacts of anxiety on new product adoption decrease,” says Lin.

For Andreas Eisingerich, professor of marketing at Imperial College Business School, the most encouraging finding of the research is that anxiety is not always a bad thing. “Strong anxiety, when paired with strong hope, can lead to greater levels of perceived control and that’s because people have action planning,” he says. “Anxiety does not always have to be bad when paired with strong hope – the strong hope has to be there.”

● **‘Strong anxiety boosts new product adoption when hope is also strong’; Yu-Ting Lin, Deborah J MacInnis, Andreas B Eisingerich, *Journal of Marketing*, Vol 84, 5: pp60-78. First published 10 July 2020.**



Auditing sludge



You'll have heard of 'nudge', and although you might not have heard the term 'sludge', you'll be familiar with what it means in practice. It's when consumers or businesses face high levels of friction that obstruct their efforts to achieve something that is in their best interest, or are deliberately misled or encouraged to take action that is not in their best interest.

Here are some examples that you've probably experienced first hand:

- Clunky and badly designed benefits application processes
- Subscriptions that are hard to cancel
- Overly complex and time-consuming registration processes; or
- Trying to purchase an insurance policy or flight without unnecessary add-ons.

Some are intentional – put in place knowingly to help maximise profits and customer base – but many are unintentional and are simply the result of poor or rushed design or oversight.

The impacts of sludge can be both physical and psychological. Physical impacts include loss of time and money, as well as being saddled with sub-optimal products and services, like a bad internet service provider or gym membership.

Meanwhile, psychological impacts include frustration, stress, anxiety, anger, embarrassment, shame and helplessness resulting from sludge tactics that aim to – or unintentionally – confuse, shame or control the consumer.

Regardless of whether it is intentional or unintentional, monetary loss is a common impact of sludge. This could be from purchasing unneeded add-ons such as extra insurance or abandoning a refund claim.

We might also end up with a product or service that is sub-optimal. A 2019 study found the first evidence of how 'sticky defaults' can lead to consumers opting for something they would not otherwise have chosen. A typical example is how these can 'force' consent of data sharing. Opting out is not always easy; consumers are often given a highlighted option to 'accept' or an alternative option for 'settings' which they must muddle through to find out how to opt out.

The 'sticky' defaults example often generates feelings of helplessness and frustration. Psychological impacts may also

relate to social factors; some individuals are deterred from accessing a service such as welfare benefits because of shame or embarrassment, not wanting others to know about their need to claim.

There are also negative impacts for organisations. High levels of friction can often drive up call centre costs because of customers needing to get advice and resolve simple queries rather than experiencing a seamless customer journey online.

Over the long term, sludge might also lead to or contribute to a loss of reputation and trustworthiness for the organisation responsible. In turn, this could harm business or have other negative consequences.

The rise of the 'sludge audit'

Many experts believe all organisations – private and public – should be carrying out regular 'sludge audits' – a term coined by behavioural scientist and consumer rights advocate Cass Sunstein. In the same way that accountants ensure company books are balanced and above board, behavioural science practitioners and user experience designers have the frameworks and concepts needed to analyse the consumer journey for purchasing a product or service and ensure it's free of sludge.

Companies conducting their own sludge audits might check for any unnecessary friction in the consumer journey that causes either sub-optimal decision-making or feelings of frustration and other emotions and take action to ensure their products and services are consumer-friendly.

In May 2020, Netflix announced it would start asking inactive users if they want to keep their subscription. If they don't want it, or if they don't respond within two weeks, the company will automatically cancel their service. Netflix has segmented inactive users and applied different approaches: subscribers who haven't watched anything since they joined will receive a notification after one year; subscribers who have used their account in the past but no longer do so will receive the notification after two years of inactivity. Since Netflix is so prominent, its action may inspire others to follow suit.

How can companies start a sludge audit?

We think taking an objective approach is the most robust:

- Find out how many customers you are losing because of sludge

- Identify areas of potential friction – for example, sign-up processes for new customers – by analysing where people drop off the journey and conducting qualitative research
- Assess the readability of your communications. Is everything in plain English or is it acronym and jargon-heavy?
- Assess the monetary impacts – what is sludge costing your customers? What is it costing you?
- Assess the different psychological costs – what emotions are people experiencing and to what degree?
- Find out how many hours are spent with unnecessary sludge by customers and employees.

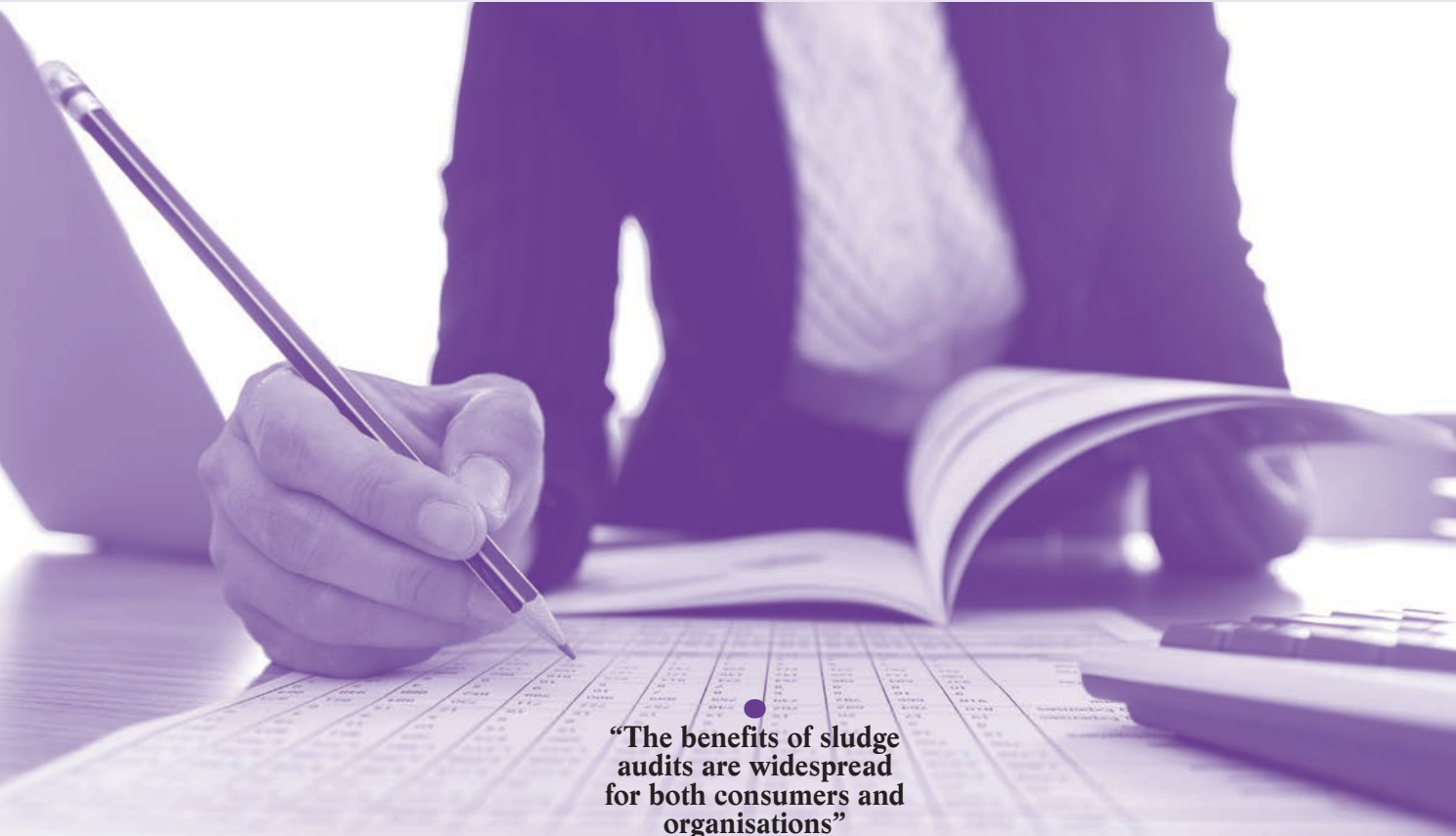
This type of approach has been adopted by Professor Dilip Soman at the University of Toronto, who has spearheaded an initiative to create a scorecard to allow organisations to conduct their own sludge audits. It assesses three components – process, communication and inclusivity. Inclusivity is a novel component; his team noted that some individuals are deterred from accessing a service because of shame or embarrassment.

One final point is how best to frame a sludge audit to your colleagues. Sludge can be an off-putting term, but framing an

audit as aiming to make behaviour easier or identifying and removing friction using behavioural science is a more positive approach. Reframing it as a ‘friction audit’ could make companies much more receptive to the process.

Implications

- Awareness of sludge is growing rapidly in many fields and sectors
- There is a huge opportunity to develop sludge audits or friction audits to eliminate it from much of our daily lives, giving consumers back time and money and removing high psychological costs
- Investing in developing an objective toolkit for assessing sludge in any organisation will reap rewards
- The benefits of such audits are widespread for both consumers and organisations. One of the most significant is a better customer experience, which in turn often leads to more loyal, happier customers and an improved company reputation. Consumers save time and energy and end up with products and services that meet their needs. Companies may also be able to reduce costs if call centres are less overwhelmed.



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“The benefits of sludge audits are widespread for both consumers and organisations”
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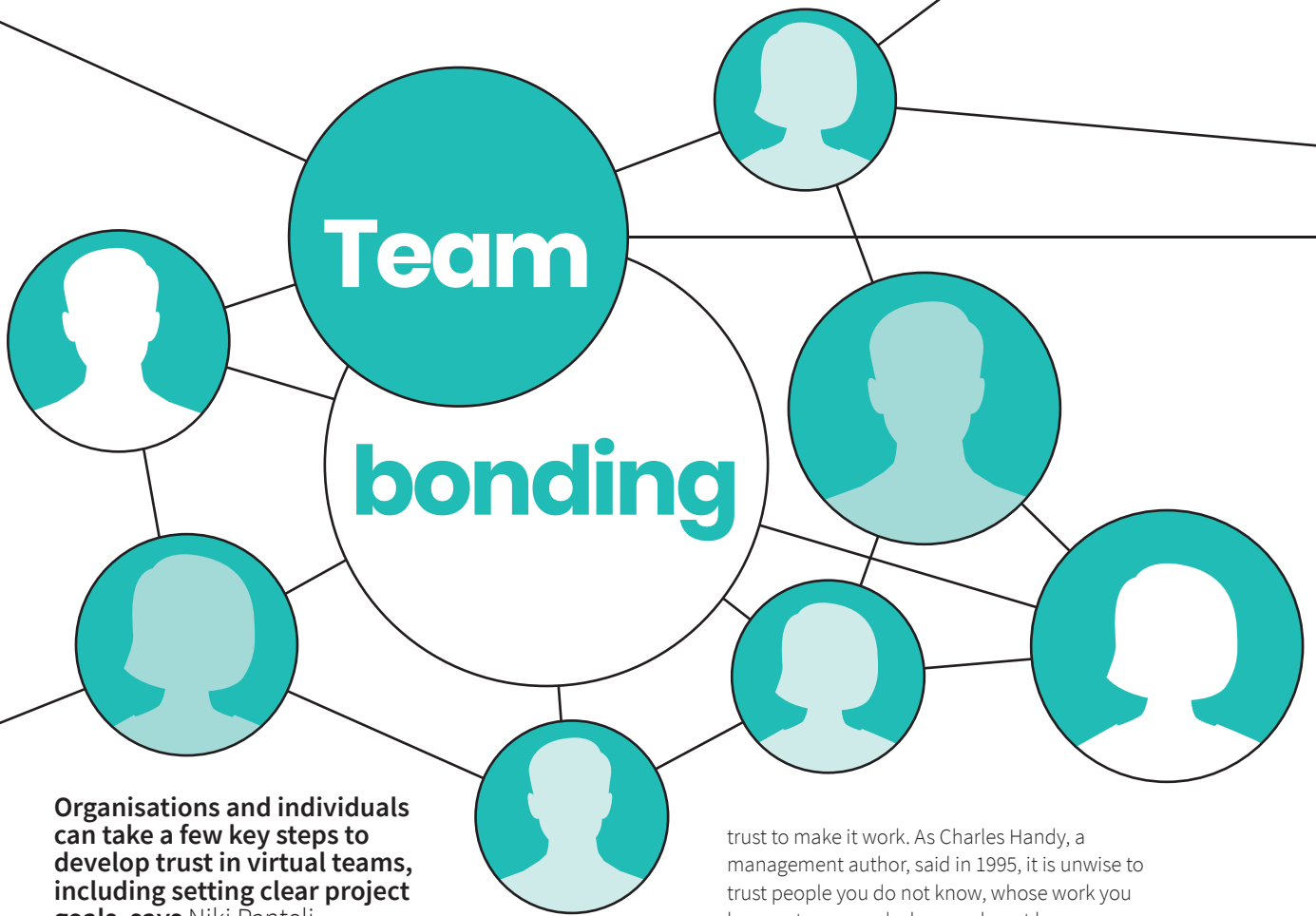
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Organisations and individuals can take a few key steps to develop trust in virtual teams, including setting clear project goals, says Niki Panteli

Trust is an important ingredient for working effectively and successfully online. Nevertheless, it is often reported as one of the key challenges of virtual work.

With virtual teams, work can take place anywhere, anytime, while the use of different communication technologies enables dispersed employees to work on joint projects.

This form of work is not new, but up until recently it was a choice. For organisations, it was a way to bring talented individuals together, regardless of their location, to collaborate on joint projects; for individuals, it was a preference to work flexibly, both in time and space. With Covid-19, and because of the ongoing lockdowns, virtual project teams have become a necessity – an enforced way of organising and, often, the only form of work arrangement for many professionals and organisations.

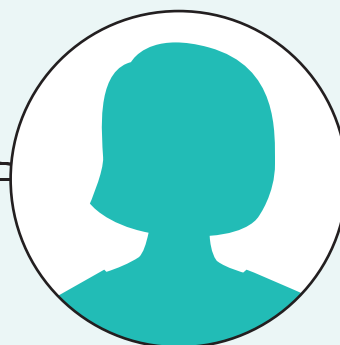
Trust has been found by several scholars to be crucial for the success of virtual project teams. It has been specifically stated that virtuality requires

trust to make it work. As Charles Handy, a management author, said in 1995, it is unwise to trust people you do not know, whose work you have not seen, and who you do not know are committed to a project. Yet he also said if we are to enjoy the benefits of virtual teams, we have to trust more.

For Handy, a way to develop trust online was by promoting face-to-face meetings among the dispersed team members. However, this may not always be possible because of budget, time and current travel restrictions, for example. So, the question that I have been asking in my own investigations is: how does trust develop within virtual project teams?

After a series of qualitative case studies and interviews with virtual team members in organisations across different sectors and of varied sizes – including small firms and large multinationals – I have come across teams that experienced high trust and others that experienced low trust. Unsurprisingly, members talked enthusiastically about the former, but shared their frustration at being part of the latter.

Based on my research in this area, I argue that trust, whether high or low, is situated in the interactions between virtual team members. So, my position is that it is within these virtual team



interactions – which are primarily technology-mediated – that trust could flourish (or diminish). As such, in this context, it is important to communicate competencies, roles and responsibilities, because these add clarity, as well as an awareness and appreciation of who is who and their involvement in the project.

Responsiveness is also vital; when members do not respond to emails with no explanation as to why, this causes frustration and misunderstanding, which would then lead to mistrust.

My research has also shown that there are different factors that can contribute to trust development within virtual project teams. These point to the significance of shared goals, power positioning and e-leadership in influencing trust development within teams, collectively reinforcing the view that virtual collaborations require trust among the dispersed team members in order to be effective.

First, the availability of clear project goals – as well as an awareness of the goals among team members and the extent to which these are known and shared – have an effect on trust development. In relation to this, the process of jointly constructing project team goals holds significant value, as it may provide the ‘glue’ to hold team members together long enough to make possible the development of mutual trust online.

Second, my studies found that, in high-trust virtual teams, power differentials do not disappear; instead, power shifts from one member to another throughout the life-cycle of a project, depending on its phases and requirements. Doing so shows appreciation for the unique expertise and talent that individual members bring to the virtual project. Interviewees described the power within their team as originating from knowledge and noted that, at any given point in time, the most powerful was the individual with the most relevant information.

Third, the role and behaviour of the virtual project leader has been shown to be a significant resource in promoting trust and supporting employee engagement during the various project stages. In our study of a temporary virtual project, the leader’s support was in the form of giving

Building trust

- **Work on virtual projects requires trust to be effective**
- **Trust (either high or low) is situated in the interactions of virtual teams**
- **Shared goals (or the lack of) influence trust**
- **The process of constructing shared goals contributes towards trust development**
- **Power shifts originate from members’ knowledge and expertise**
- **E-leaders offer information and motivation, empathy and employee engagement**

direction, showing empathy, and offering feedback and encouragement, with the aim of keeping employees motivated and informed about the progress of the project.

Ultimately, frequent virtual interactions, with a combination of synchronous and asynchronous means of communication throughout the life-cycle of a virtual project team, are important while taking account of project requirements at different stages.

E-leaders should facilitate multiway communication, encourage silent members to contribute to discussions, have one-to-one meetings, and get to know individual members and their needs. Above all, it is the quality not the quantity of communication that will help to develop trust and bonding.

● **Niki Panteli is professor of digital business at the School of Management at Royal Holloway, University of London**

The dawn of a new era?



In September 2020, the Department for Digital, Culture, Media & Sport (DCMS) published the UK National Data Strategy. It is a large-scale document with a very straightforward objective: to reflect the opportunities and challenges of our new hyper-digital world, weigh the priorities and potential trade-offs of data in a deliberate and evidence-based way, and, above all, drive growth in the UK economy and power its recovery from Covid-19.

Secretary of state Oliver Dowden sets an important framework for the publication in his foreword: when he became digital secretary, he vowed to be “unashamedly pro-tech” (his words, not mine. I would be asking questions such as: “Pro-tech, as opposed to what? Pro-analogue? What do you see as the antithesis of pro-tech? Pro-privacy and data protection? Pro-competition and antitrust?”). He sees the strategy as seeking to maintain the high watermark of data use set during the pandemic, and to free up businesses and organisations to keep using data to innovate, experiment and “drive a new era of growth” (again, his words, not mine. Mine would tend to underline the exceptionality, speciality and peculiarity of the use of data during the pandemic. Also, what exactly does “free up” mean?).

The scope and size of the document are gargantuan. Tackled in its entirety, one cannot but recognise the significant effort put into identifying and addressing all levels of data relations. The strategy is welcomed for being – as suggested – a framework that, undoubtedly, needs to be developed in concrete actions and measures. It is a very commendable publication, and tackles data in its entirety – “information about people, things and systems, personal data, biometrics, demographics, systems and infrastructure, used to describe location, information generated by sensors, administrative, operational and transactional data, as well as analytical and statistical data”.

Considering the nature and the objectives of the document, it is an understandable choice. However, the missed opportunity to take a stand by clearly distinguishing the treatment of personal and of non-personal data is still quite surprising; such a stand

could have helped reinforce concepts long-embedded in ethics, society and legislation. Making data available for enabling value creation is a worthy and strategic action, but it cannot be achieved at the expense of data-privacy rights.

Without going into the details of the strategy and without losing all hope in a fair data future, let’s see one major critique (legislation on data protection) and one major opportunity (data skills).

When the strategy was first published, the general reaction was to see it as a nail in the coffin of acquiring EU adequacy. Since then, another nail has come from the Court of Justice of the European Union, which found that UK surveillance measures on bulk retention and access of communications data are incompatible with EU fundamental rights.

Another possible hiccup might be the implementation of the UK-US bilateral data-sharing agreement.

The strategy refers to “securing a data regime in the UK that is not too burdensome for the average company [...] that] will support vibrant competition and innovation, building trust and maintaining high data-protection standards without creating unnecessary barriers to data use”. The strategy also intends to “drive UK values internationally: now the UK

has left the EU, we have an opportunity to set the UK apart and take an independent, individual approach that extols UK values. [...] We want to ensure that UK values of openness, transparency and innovation, as well as the protection of security and ethical values, are adopted and observed globally.”

The strategy seems to suggest that a revision of the internal and international data-regulation framework is coming, one that should be led by different values than those in effect until now. I might be missing something, but have core fundamental rights and values changed in the past couple of years? Has something occurred in the UK since the adoption and application of the General Data Protection Regulation (GDPR) that calls for such critical revisionism? Are fair, practical and clear rules, clear and trustworthy data-governance mechanisms – the ethical grounds of data protection, consumer protection legislation and

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“The missed opportunity to take a stand by clearly distinguishing the treatment of personal and non-personal data is quite surprising”
●



competition law – no longer UK values, as they were when it was part of the EU? After all, the GDPR has been the benchmark for demands for greater data-protection legislation across the globe. So, I guess the question is: what are the UK values to drive internationally? Should we really read this against the background of the Internal Market Bill, an agreement that, according to the government’s own admission, breaches international law? Then I guess I really did miss something, and UK values have changed considerably.

Data-protection legislation should not be this controversial. As *International Journal of Market Research* editor-in-chief Daniel Nunan notes in the September issue: “It is customary to criticise the burden of regulation – the red tape that makes research more difficult to carry out [...] With the benefit of hindsight, perhaps the past 10-15 years of ‘anything goes’ use of data will be seen as a historical anomaly, much in the same way the harmful periods before the regulation of advertising, tobacco, or food safety. So, the wheel turns. With it, the value of the research expertise needed to navigate this world will also increase. Accustomed to a world of ever growing analytical possibilities, researchers in the future may need to learn to make do with less. It is those with the skills to navigate this world and understand that research was never just about the data who will prosper.”

It is precisely with these researchers in mind that MRS is one of the main drivers behind the Advertising Association’s recommendation that the UK government introduces a sector-skills grant scheme. The aim of the scheme would be to invest in individuals and businesses most affected by the impact of the Covid-19 pandemic, allowing them to acquire new skills – particularly in digital and data – and, thereby, grasp new opportunities to support the UK’s economic recovery.

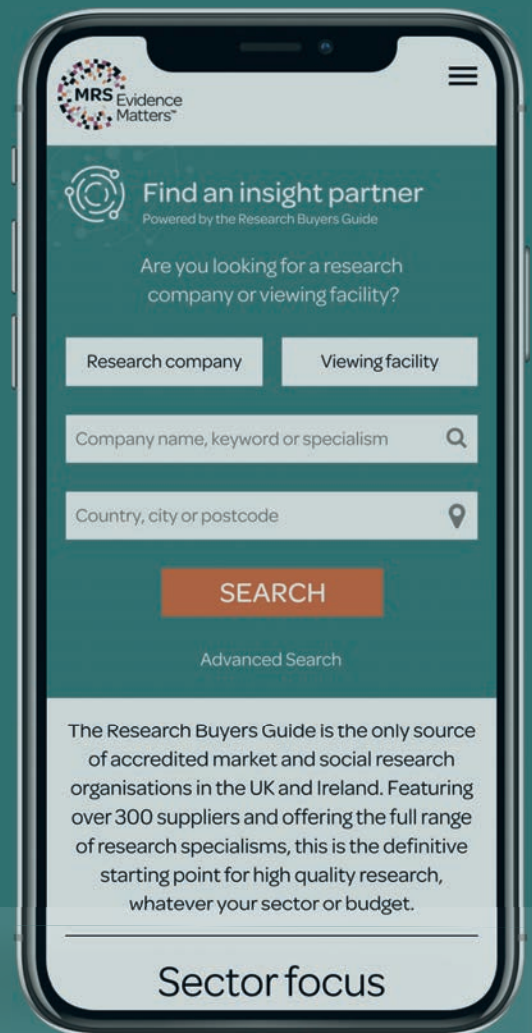
The proposed scheme would include support for industry training for new starters. For an initial 12-month period, it would allow professional development providers – especially professional bodies and trade associations that typically set the standards and develop the skills for their sector – to apply for grants to provide free skills training and/or qualifications to: practitioners who have been furloughed and/or made redundant as a result of the Covid-19 crisis; college and school leavers aiming to enter the sector; and businesses that are unable to invest in staff because of significant decreases in revenue/trading as a result of the pandemic.

The proposal is currently under consideration by the government. I have no doubts it fits the objectives and purposes of its National Data Strategy... but will the government agree?

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It's time to evolve and involve

First, I would like to wish you a happy new year. The year gone has been quite extraordinary, and the ongoing health and economic crises make it difficult to be as optimistic as we would like to be at this time of year.

However, there have also been many positive actions amid the upheaval, which we need to recognise and build on. In particular, we need to ramp up our efforts to make this sector a leading example of diversity, inclusion and equality.

MRS has embedded many initiatives that are improving representation and opportunities for the various groups that have protected characteristics under the Equality Act 2010. But our sector, more than any other, cannot become complacent; we must evolve rapidly.

As chief executive, my view has always been that the sector that is meant to shed light on people should also reflect them in its own make-up.

Some of the largest employers in the industry have signed up to our CEO Pledge and, as it moves into its second year, I'm delighted that the pledge is now becoming international in scope.

A finding from our latest report on inclusion is that confidence is higher among LGBTQ+ constituents than any

other group that falls within the protected characteristics definition. I am sure that the energy and pizzazz of MRS Pride has made a significant contribution to this sense of vigorous momentum. You can find the report at mrs.org.uk/inclusion.

Our research also identified the need to give a voice within the research sector to ethnic minorities. MRS already works to a target of 50% representation for women speakers at our events; now we have added that 15% of speakers must be from ethnic minority groups.

The MRS Apprenticeship scheme will improve the sector's reach into less traditional areas of market research recruitment. It's an initiative born of MRS and, frankly, is the reason the Society exists – to turn the mirror inwards onto our sector and ensure it is transforming.

Last year, our first gender-balanced Main Board created the MRS Diversity, Inclusion & Equality Council. It has a remit to get things done quickly. The Black Lives Matter movement underlined the need for urgent action.

If the tumultuous events of last year have taught us anything, it's that people are frustrated by slow-moving institutions that fail to evolve. MRS and the research sector will not be one of them.

Sector and MRS news

Diversity, Inclusion & Equality Council

A new cross-sector group, featuring representatives from networks such as CORE, WIRe and MRSpride, as well as the client and agency world, has been formed. The MRS Diversity, Inclusion & Equality Council aims to: build awareness of the ongoing work that is already happening; make connections between people and organisations at the forefront of change; and guide the research industry on issues of representation, equality and accountability. See mrs.org.uk

Research guidance

MRS continues to issue new guidance interpreting the Covid-19 restrictions in the UK, specifying the implications for face-to-face data collection in England, Northern Ireland, Scotland and Wales. See mrs.org.uk

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Conferences

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21 January

Creating Insight-led Experiences

Build a holistic understanding of customer behaviour, values and satisfaction with insight, CX and UX.

4 February

AI/Data/Analytics

Insight generation is fizzing with innovation. This conference brings together the three strands of data science that are transforming the insight industry.

25 February

Digital Ethnography

In a post-pandemic world, digital ethnography will allow more opportunities to understand customer behaviour. New for 2021, this conference takes a deep dive into methodologies that garner rich insight.

25 March

MRS Annual Conference

Impact 2021 – Transformations and Recovery

This three-day digital event provides more variety, more voices and more advantage than ever. This is the insight conference that highlights the critical tools for change needed for future success.

16-18 March

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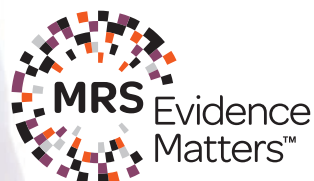
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The Market Research Study Centre

John Gibson

Advanced Certificate Awardees 2020

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Panagiota Bratsa
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Hannah Chandler
Gabriella Clancey
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Sir Ian Diamond is the UK's national statistician, head of the Government Statistical Service and chief executive of the UK Statistics Authority. He provides overall leadership for the Office for National Statistics and the statistics profession across government

1 What is the most often misunderstood aspect of statistics?

What many people don't understand is just how big a role the collection and analysis of data plays in their lives. The statistical community could do more to help people understand the sources by which we securely collect data. We work with anonymised data from a variety of sources, such as data people provide when applying for services.

Public trust is very important. I think the public are largely supportive of sharing their data when they are kept informed of how it is used, when robust safeguards are explained, and when it's for the good of society.

2 Has understanding improved or worsened during Covid-19?

The pandemic has been transformational in bringing statistics to the public, and people are increasingly aware of some of the challenges in making comparisons using statistics. The media have been good at trying to communicate what the statistics are saying. There is always more to do in improving statistical literacy, but we have made a good start.

3 What role can data play in building a fairer society?

The pandemic has shown how areas of society face tougher conditions than others. In the UK, our data has revealed the greater risk of death faced by black,

Asian and minority ethnic people, and the mediating influence of disadvantage.

This is a salutary reminder of how official statistics need to reflect the experiences of the whole population. That is a theme of the 2021 England and Wales Census, which will have questions on sexual orientation and gender identity for the first time. We've also established the Inclusive Data Taskforce to improve the UK's data holdings.

Data gives us a window to see problems that are otherwise invisible. By pushing for better use of statistics that can be broken down by protected characteristics, we can provide a solid evidence base to help us understand what action is needed to correct these problems within society.

4 Will the demand for timely data continue?

Covid-19 has illustrated the direct connection between data, policy and society. We are accessing new types of data and working with government departments to offer insights like never before. The potential for new insights by combining live datasets held across the public sector and exploring more experimental sources of data is huge.

5 How important is collaboration?

It is key. As Covid-19 has continued to take its toll, we have worked with academia and government to find information quickly and to provide

evidence to support decision-makers.

Assembled in days, our study with the Department of Health and Social Care, the University of Oxford, IQVIA and the National Biosample Centre shows how powerful collaboration can be.

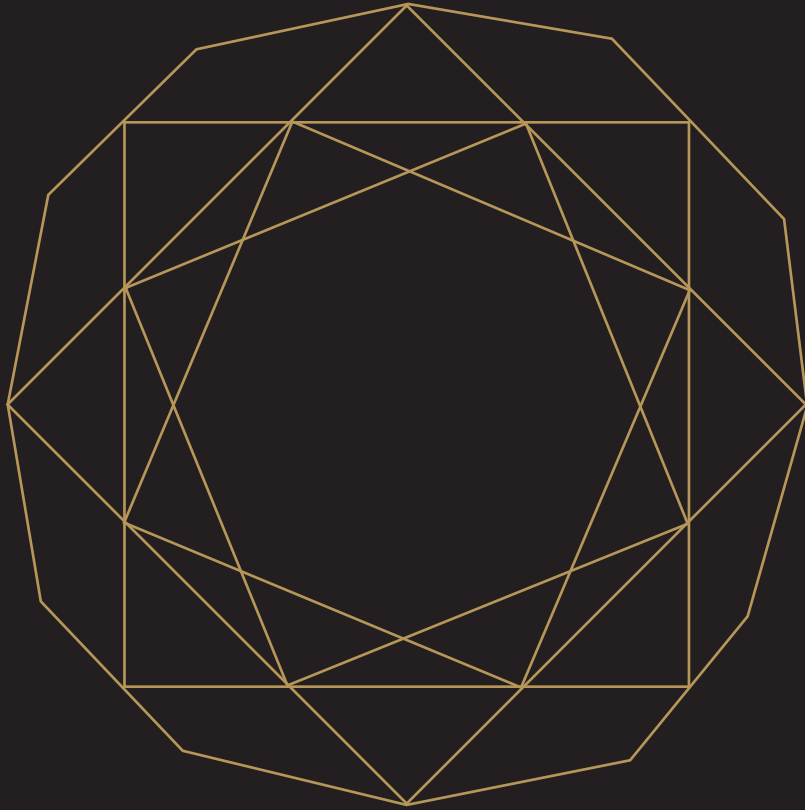
6 Is the relationship between statistics and data science a comfortable one?

Data science has great potential, but it is only one part of the way in which we use data. None of us should be working in silos. We need to work with policy-makers to make sure our data and analysis are useful and fit for purpose, and to have a proper impact on policy.

7 The Covid-19 crisis has accelerated the use of administrative data. How will you build on this?

By joining up the administrative data being created by government and public bodies, we have an evolving picture of what is happening in society, leading to more informed policy decisions, more effective public services, and a reduction in collection costs and the burden on the public to provide survey data.

We are looking for new sources and working with other organisations to make the most of the rich data out there. New funding of £6.8m will help develop a government-wide initiative that will, for the first time, link and provide access to existing public data in an ethical, secure and controlled way.



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