

impact

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Using evidence & insight to make a difference

+
Twitter's
Bruce Daisley
on happiness
at work

How does
the market
research
industry fare
in a mental
health audit?

Beyond the cliché





Stereotypes limit our understanding,
so market research must be at the
forefront of diverse thinking





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Not one type



Watching ITV's *65 Up* – the latest instalment of Michael Apted's seven-yearly series that has documented the lives of a group of people since 1964 (a piece of immersive qualitative research of sorts) – one thing that stood out was the stereotyping.

Fixed ideas of social class were central to the original selection of seven-year-olds, and gender-specific questioning was rife; Apted asked the girls whether they wanted to get married and have children, while focusing on what jobs the boys aspired to.

We've come a long way in 50 years, but perhaps not far enough. Stereotypes are an easy way of grouping people, working on assumed patterns, generalised behaviours and cultural preferences. But they are limiting; they narrow opportunity rather than broadening it, as Tim Phillips explores (p28).

Research and insight practitioners can – and should – challenge stereotypical thinking. It's not just the right thing to do, it's good research and good business, and it calls for the best of our methodologies. From where focus groups are carried out, to online communities are managed, to gender assumptions in surveys, research techniques need to be scrutinised to ensure they aren't opting for the easy, in preference to the robust.

Someone may present as a woman but that doesn't mean they were born as one. Do your surveys make gender assumptions or allow for this fluidity?

The argument that it's not necessary because the numbers are too small is often used. But that's not the issue; it's as much about showing your research is tuned into the widest possible audience – less a case of statistical significance and more a case of embodiment significance.

People don't revert to stereotypes out of malice, but through lack of thought and because they simply don't know any better. This is where inclusive recruitment policies are essential. Are there diverse voices within your own organisation and can they be heard?

Brands that get it wrong – through lazy stereotyping, misplaced alliances or superficial marketing – are gleefully ridiculed on social media and in the press. For every pink biro and 'Beach Body Ready', you can't help think why didn't someone – in the marketing team, in the organisation, in the agency – call this out before it reached the wider public, and why weren't they listened to?

In May, the MRS held its inaugural #MRSPride networking event and there was much debate – and mostly tension – about the Marks & Spencer LGBT sandwich. But compared with many, M&S is forward thinking and has worked hard to be diverse.

So, I thought I'd share our president Jan Gooding's wise words from the event. She said that we don't want to discourage brands trying; mistakes will be made, but if they are done from a place of kindness, they will be forgiven. A lesson we should apply in many places.



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Rory Sutherland **Columnist**

Perceiving emotional efficiency



Here's a very simple question. Imagine you are at a board meeting where a group of people put forward a tightly costed, well-argued proposal for the design of a new railway station. Everything within the proposal makes perfect economic sense; the throughput of passengers will be efficient and retail rent high, and there will be an array of ticket barriers to prevent fare evasion.

Now, imagine raising your hand with the following objection: 'I like your proposals on paper, but I can't help feeling the station you propose lacks brand resonance'? Or, more specifically, 'Yes, all well and good, but where's the champagne bar?' It's likely that you would be treated like a complete idiot. In business - and more so in government - collective decision-making has become an exercise in the display of pure rationality.

This is a problem. It is a problem because we, as humans, do not really care about the things that rational people think we should care about.

The reason is simple - we have not evolved to perceive the world objectively. Our sensory and emotional apparatus has been calibrated to detect and react to things according to their importance to evolutionary fitness, not their measurable qualities. We are, for instance, disproportionately attuned to detect faces in things - even inanimate objects - because, in evolutionary terms, things with faces are usually more important to our survival or reproductive prospects than things without eyes, noses and mouths.

We are ineluctably wired to respond to oblique inference, meaning and significance, rather than to objective metrics.

So, it is possible to produce something that, in objective terms, is a significant improvement and find that people don't give a damn. It is also possible to make rather trivial changes around a product or experience and find that people's emotional state is transformed.

A television emits three primary colours - red, green and blue; these are the only colours to which human vision is sensitised. Televisions don't produce ultraviolet and infrared light because humans cannot detect them; and they don't produce yellow photons

because the impression of yellow can be created more efficiently by firing equal quantities of green and red light.

When we design something for human experience, we should focus our efforts in the realms of perception to which humans are emotionally attuned, and improve emotional resonance over quantifiable objective properties.

Take that railway station example. When St Pancras was reopened, after a long refurbishment, to cater for new high-speed and Eurostar trains, the press release contained the detail that it now contained 'the longest champagne bar in Europe'. This bizarre fact seemed to resonate with journalists, who all faithfully reported the news.

Now, if you were to ask for a long champagne bar in that board meeting, you would look like a trivial idiot. In collective decision-making, even mentioning subjective factors would expose one to the risk of ridicule.

Any rational person would suggest that 'the longest champagne bar in Europe' was a fairly crappy superlative. Generally, people don't care how long champagne bars are - but, to human perception, that sentence was a burst of pure green light. In one sentence, it conveyed that this station was not a mere utilitarian transit hub - it was a place of entertainment, and a destination in its own right.

How would you sell such an idea to a meeting obsessed with throughput and fare evasion?

What if we borrowed the language of our reductionist, rationalist colleagues and, instead of saying, 'the station lacks a brand differentiator', we said 'how can we make the station more emotionally efficient?' I Googled it, and the phrase is almost unused. Yet the borrowing of the word 'efficient' will force our colleagues to take note in a way that marketing language never will. Or what if we were to reference Kano theory, and explain that every successful product needs to possess something that goes beyond functionality?

This, to me, has always been the second most exciting aspect of behavioural science, after the science itself. It gives us a vocabulary that might bridge the gap with finance, rather than widening it into a chasm.

“We, as humans, do not really care about the things that rational people think we should care about - we have not evolved to perceive the world objectively”

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World view

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

“Unrestricted driving is a German norm and citizens see it as reflective of their autonomy, summarised in the phrase *freie Fahrt für freie Bürger* (freedom to drive for free citizens)”

(p10)

4.2 million people die annually as a result of outdoor air pollution

(p16)

Almost half (44%) of young football fans say the women's game doesn't appear on their radars often enough

(p14)

“From the athletes to the federations, to broadcasters and brands, this is the biggest modern-day moment in women's football. It's a tipping point for the future of the game”

(p14)

“The American character to date has been marked by optimism, but this has been taking a battering. Across the political spectrum there's a sense of unease about where the country's going and its place in the world”

(p17)

69% of UK consumers believe manufacturers should do more to reduce sugar in food and drink

(p12)

In the driving seat

Research on choice by Join the Dots has found that consumers in Germany are finely balancing their need for control with the freedom of convenience. By Kate Skivington

Our need for choice is important because it gives us a feeling of freedom and personal responsibility – but too much choice can evoke negative emotions.

Globally, we are seeing a trend of choice overload, as we are exposed to more information than ever before. Consumers' lives are dominated by online marketplaces such as Amazon and Alibaba, where we expend mental energy making trade-offs and comparing the potential negative consequences of choosing one product over another.

A recent global report from digital assistant company Zoovu found that 54% of consumers have stopped buying products from a brand or retailer website, because choosing the right product was too difficult.

How people view and make choices is based on deep-rooted cultural values and shifting contextual factors. We recently carried out research in Germany – combining quantitative research with cultural contextualisation – to explore how German people view choice, and how they navigate too much of it.

A culture of rational choosers

German culture places high value on rationality and certainty, with the belief that risk should be mitigated. 'Good' choices are typically viewed as ones that consider all of the potential outcomes, with contingency plans in place – this is most clearly seen in the value that Germans place on insurance and savings.

Our quantitative survey of 1,000 Germans identified that, when it comes to a perspective on choice, the overwhelming feeling is that of neutrality. This reflects the belief that a choice should be made through weighing up all of the information, rather than being led

by emotion. Compared with another western market, such as the US – which views choice more emotionally, given the link to personal freedom – this is an interesting and unique characteristic of the German market, which we sought to explore in more depth.

This relationship with choice can be traced back to events in German history, including the rise of fascism and the mass surveillance that followed. This has left a lasting national mindset of vigilance, as many Germans seek to have increased control over their personal data and choices. As a result of this, Germany has stricter data protection laws, and brands have to ask for the consent of consumers before collecting or storing it.

Linked to this, Germans have a natural suspicion of being sold to, often questioning product claims and preferring to trust expertise and quality. A well-known saying in Germany, reflects this attitude – *Qualität vor Quantität* (quality over quantity). Many consumers look for the 'Made in Germany' seal of approval, as well as trusted sources to help them decide what to buy – for example, Stiftung Warentest, an independent review site that objectively reviews products and services.

Making choices instinctively is not encouraged. Instead, choosing what to buy involves filtering information and assessing risk. It is not surprising that the word most associated with choice in our research was *entscheidung*, meaning 'decision'.

Convenience conundrum

To understand more about how Germans navigate choice today, we enlisted the help of our 'Illume Guides' – in-market consumers who can give us an on-the-ground perspective.

The more options available in Germany, the greater the demand for convenience to help savvy consumers filter them.

There is an interesting tension here, as Germans have to balance control with this need for increased convenience. Traditional offline shopping practices, such as catalogue mail ordering, are being replaced by online shopping, allowing consumers to compare products easily and choose from delivery options. The German retailer REWE, for example, has recently invested in its fresh food e-commerce offer.

With this increased convenience, however, comes the potential to lose control of 'choice' and many Germans



- 77% of respondents in Germany agree that brands should make choosing easy, and not waste people's time with endless options
- 64% said they would not tolerate 'good enough' from brands, products and services
- 38% of Gen Z respondents feel excited by the increase in choice, compared with 25% of 'baby boomers'.

(Join the Dots research)

– particularly the older generation – are worried about this. Amazon Dash, for example, was recently banned in Germany because it was deemed to take control away from the consumer.

Making better choices

Increasingly, Germans also need help making more sustainable choices. They live in one of the most environmentally

conscious countries in the world, and green initiatives are well practised throughout society. The German government is taking away the mental strain of having to make a better choice by enforcing 'greener' behaviours. The 'five-point plastic plan', for example, includes large fees for companies that use environmentally unfriendly packaging, such as single-use plastic.

A less popular example is the potential introduction of an autobahn speed limit. Unrestricted driving is a German norm and citizens see it as reflective of their autonomy, nicely summarised in the phrase *"freie Fahrt für freie Bürger"* (freedom to drive for free citizens). As a vehemently environmentally conscious nation, this regulation would seem like a no brainer, but it is at odds with the culturally engrained freedom of choice.

Younger consumers, in particular, are demanding that brands help them make

the 'right' choice by providing transparent information about sustainability that allows them to make informed decisions.

The survey data suggests that Germans are neutral towards choice – but this does not mean they are apathetic to making choices, or dislike having options to choose from. The reality is that they need help to navigate what is available, so they feel in control of their decision and can make it efficiently.

German brands, such as the mobile-only bank N26 and Klarmobil, have responded to this with claims and marketing communications around 'no bullshit' and 'no hidden costs'.

For brands looking to gain traction in Germany, it is about connecting with consumers on a rational level, putting them in the driving seat of making a choice.

● Kate Skivington is cultural and trends strategist at Join the Dots

80% of Germans are concerned about the level of use of disposable, non-recyclable products

Source: Statista

The first data protection law in the world came into force in the German state of Hessen in 1970

Germany ranked top of EU countries predicted by IT professionals to enforce GDPR most rigorously – stated by 76%, with the UK second at 57%

Source: Statista



Sweet truth

More than a year on from the introduction of the sugar tax, UK consumers still have a soft spot for all things sweet.

By Emily Pitman

With alarmingly high levels of childhood obesity reported in the UK, and mounting pressure from Public Health England, the government introduced a sugar tax in April 2018 – and it's safe to say it has saved the nation millions of calories over the past year.

After the levy was announced, soft-drinks companies faced a major fork in the road: take the difficult decision to reformulate their products and risk customers disliking the changes, or find a way to fund the levy – in most instances, by simply charging more to account for the difference.

Despite the best efforts of many brands, the introduction of the tax and subsequent changes to drinks – be it to the recipe or price – didn't escape criticism from consumers. There was also

a backlash over the 'nanny state' style of the measure.

How worried are consumers about sugar?

Despite the initial criticism, Walnut Unlimited research shows the backlash doesn't mean consumers are not concerned about their sugar intake. In fact, our recent surveys show that a third of the population are worried they consume too much sugar and half claim to be actively trying to reduce it. These findings are most prevalent among millennials, with concern about sugar rising to more than half among 18 to 34-year-olds.

With an increase in flexi-lifestyles – people mixing up their diets to improve their health – and more moderate

consumption of alcohol and indulgent foods, the country was primed for changes such as these – so, is consumer behaviour in the UK changing?

In simple terms, not really. Reducing sugar is clearly something consumers believe they should be doing, but – as a nation – we still appear to be too easily swayed by sweet treats to make significant behavioural changes.

While there's always a gap between what people say and what they do, our data demonstrates – one year on – that far fewer people have changed their consumption habits as a result of the tax, than initially claimed they would. Slow and subtle changes have been made, however. Kantar data showed that in February, sales of diet drinks are surging and those of sugary drinks declining.

'Help me be healthy'

To stay relevant, brands are seeking to develop tasty, sugar-free options. These days, however, that means going beyond the traditional sense of 'diet' and tapping into the healthy mindset. Some people are self-regulating their diets, but – to make a real difference – manufacturers must take responsibility for reducing sugar content in their products. When change is made at source, such as reformulating recipes, consumption habits are forced to change.

Consumers increasingly want brands to help them become healthier, and brands need to play a major role in encouraging healthy choices. Many – including Ribena, Fanta, In-Bru and Lucozade – have successfully reduced the sugar in their products. With our data showing that almost half of consumers look for brands with lower sugar content, the onus should be on manufacturers to meet this demand and drive change.

Over the past year, brands such as Coca-Cola have successfully navigated conflicting consumer demands for great taste and healthier options through subtle 'nudges' towards the better choice. They have avoided reformulating full-sugar variants, but charge more for them. In this way, the choice is left with the consumer, but with a (small) price incentive that nudges them towards the cheaper, sugar-free variants.

Artificial v natural

To maintain the sweet taste consumers are looking for, much of the reformulation we have observed has focused on swapping sugar for artificial sweeteners. This is not without problems, however, because of widespread concern that artificial sweeteners are as bad for you as sugar. Is one truly better than the other?

Increasing innovation in natural alternatives is one thing the sugar tax has clearly influenced. San Pellegrino, for example, has adapted its range to include a mix of sugar and stevia. Using natural sweeteners and getting the taste right still poses a big challenge for brands, but the latest developments in stevia may prove more successful in meeting increasing consumer demand for a tasty, yet healthy beverage.

Weaning Brits off sugar is clearly an enormous and continuous task. While soft drinks are still a major source of sugar for children, they are just one category – our supermarkets are full of products containing unexpectedly high levels of sugar. Some encouraging progress has been made towards the government's next wave of reduction targets, but the responsibility still lies with manufacturers to drive real change. Already, we're seeing many of our clients planning for future waves of taxation with pre-emptive reformulation.

One year on, only a minority of consumers claim to have changed their behaviour as a result of the tax. Continued education on the consequences of excess sugar consumption and the benefits of making healthier choices is needed, to ensure attitudes and habits truly change.

Greater democratisation and incentivisation of healthy eating will be key, to make healthier foods appealing and affordable. People may say they are willing to make a change, and want help in doing so, but it's hard to break the habits of a lifetime without being nudged (or forced) towards healthier choices.

Emily Pitman is associate director at Walnut Unlimited

Expectation v reality

- Pro-sugar tax 34% of consumers agreed with the statement 'I'm less likely to buy sugary drinks'
- Post-tax, 20% agreed they are buying fewer sugary drinks
- 46% of consumers support the tax (-5% compared with a year ago)
- 34% are worried that they consume too much sugar
- 49% are actively trying to reduce their sugar consumption
- 48% actively look for brands with lower sugar content
- 47% support a tax on other high-sugar or unhealthy foods
- 69% believe manufacturers should do more to reduce the amount of sugar in food and drink
- 40% avoid artificial sweeteners; 41% would buy more diet products if they used natural rather than artificial sweeteners.

Walnut omnibus is a bi-weekly online survey of 2,000 adults in the UK.



Changing the game

Women's football is growing at every level, but barriers – both cultural and commercial – remain. By Katie McQuater

Throughout June and the beginning of July, France has hosted the eighth Fifa Women's World Cup, and momentum for women's football is reaching fever pitch. England's Lionesses have been on an upward trajectory since they finished third in the 2015 World Cup. New role models, more media exposure, record attendances and bigger investment has contributed to a sense that the women's game is a force to be reckoned with.

"From the athletes to the federations, to broadcasters and brands – this is the biggest modern-day moment in women's football. It's a tipping point for the future of the game," says Rebecca Smith, global executive director of the women's game at media network Copa90.

While women's football has undergone a seismic shift, access to the sport is still unequal for women and girls in terms of facilities, investment, visibility and opportunities to play, although this is changing. For the Football Association's (FA's) head of insight, Ross Antrobus, growth is driven by three things – grassroots participation, exposure at the elite end of the sport, and commercial backing.

The FA has invested heavily in increasing participation in the sport, and the organisation is well on its way to achieving its target of doubling the number of women and girls playing football by 2020. Boosting the number of girls playing will expand the talent pool in future and improve cultural acceptance of the sport – but engaging parents is key, as Antrobus explains.

"If a dad has a son, he's far more likely

to get involved in his son's football than if he has a daughter who plays football. That attitude is starting to turn – there is a groundswell of 'dadvocates' – but I wouldn't say we're over that," he says.

In football, there isn't the same network of support and familiarity stemming from generations of participation – as there is in, say, netball – from mums who have played the game themselves. This is a bigger issue than the perception of football as a 'boys' sport', according to Antrobus.

"When we were exploring different territories for how to position women's and girls' football, the idea that 'it's not just for boys' was rejected outright by all the girls and their mums. The mums said: 'I just don't talk to my daughter in that sort of language. I don't want her to go into football thinking she's a pioneer; I want her thinking that she is an equal.'"

More visibility

The FA also wants to increase the potential fan base for women's football, and is not just targeting women and girls. Appetite for the women's game is rising, as shown by the Cup final match between Manchester City and West Ham, which drew an audience of more than 43,000 at Wembley.

Additionally, a study of young fans – male and female – in the UK, the US, China and Brazil found that more than half want to watch and learn more about women's football. Despite this, visibility still needs to improve, according to the 'Modern Football Fan' research from Copa90. Almost half (44%) of respondents said the women's game doesn't feature on their radars often enough, and 26% were unaware of where to access game coverage.

Unlike men's football, which is saturated with sponsors, the women's



game remains a comparatively untapped opportunity for commercial partnerships, but that is beginning to shift. Boots recently signed a three-year partnership with the FA to sponsor the England team and the other home nations, while Barclays has become the first title sponsor for the Women's Super League, in a deal worth £10m.

Speaking at the Bloomberg Equality Summit in London, Lenah Ueltzen-Gabell, managing director for Europe and the Middle East at sports marketing agency Wasserman, said: "What we are seeing now is a real investment by brands understanding women's sport – understanding how to engage with it, the value of it."

The ugly spectre of sexism is still a big problem – according to research commissioned by the *Telegraph*, almost a third of British elite sportswomen have suffered sexual harassment and half have been victims of bullying.

In football, the issue was exemplified in a very public way when Ballon d'Or winner Ada Hegerberg was asked to twerk on stage, while Women in Football – the organisation supporting women who work in the industry – received more reports of online sexist abuse within the first two months of the 2018/19 season than in the previous 12 months. "Media has a leading role to play in this space, but it should be the responsibility of clubs, federations, and governing bodies to tackle sexism, and all forms of discrimination for that matter, just as it is everyone's responsibility within the game and beyond," says Smith.

She feels that fans can also play an important role in driving societal change from within football, "to create a sports landscape that is diverse, inclusive and accepting – and one that makes a positive impact".

Behind the mask

Polluted air is a huge problem in India, but there is a cultural reluctance to wear face masks, as research from Ipsos Mori and Reckitt Benckiser found

As collective concern for our environment gathers apace, we have never been so conscious of the indelible footprint that we are leaving on our planet. But how often do we pause to reflect on our own longevity?

Air pollution is an invisible killer and has been described as causing a 'silent genocide' around the world – the World Health Organization (WHO) estimates that it kills more than seven million people globally each year (either as a result of exposure to outdoor air pollution or from household exposure to smoke from dirty cooking stoves and fuels). Of the top 50 most polluted cities, 22 are in India and it's estimated that 40% of children in Delhi are living with reduced lung capacity.

When the Air Quality Index (AQI) in London reaches 70, this is considered unacceptably high. In 2017, air pollution

levels in Delhi hit an AQI of 800, which was – literally – off the scale.

Barriers to wearing masks

With air pollution levels on the rise in India, Reckitt Benckiser (RB) identified the need to encourage people to protect themselves from the harmful levels of particulate matter (PM2.5). Despite having a presence in the face mask space with its Siti brand, uptake was low, so RB partnered with Ipsos to find out what underpins the reluctance to wear face masks and drive behavioural change.

RB and Ipsos developed a research strategy involving ethnography, qualitative diaries and quantitative research. The research identified two significant barriers to people wearing masks. First, there is a cultural desire to conform, so people are reluctant to wear masks in case others wonder what is wrong with them – for example, whether they are carrying an infectious disease.

Second, there is an apparent blind faith in other methods of protection: shampoo is believed to rid the body of the harmful

effects of pollution, sunglasses are worn to prevent pollution through the eyes, and there is a belief that plants and trees clean the air perfectly well, so negating the need for masks. In another example, a man doing outdoor yoga claimed with great pride that the bodies of those who do yoga have evolved to cope with pollution.

Ipsos used the COM-B (capability, opportunity, motivation) behavioural framework to determine who to target, which messages would resonate with people most and which touchpoints would encourage them to wear face masks.

Putting COM-B into practice

By identifying the behavioural levers that were most likely to change behaviour, RB developed its campaign. It started with some hard-hitting outdoor advertising placed on the busiest, most polluted streets. The message was that breathing the levels of pollution in Delhi was equivalent to reducing lung capacity by up to half a lung, and this was delivered by a smart-looking (and slightly cheeky) boy.

To tap into the capability side of the behaviour, RB set out to teach people that the AQI could be measured. Instead of residents looking out of their window to assess whether it was a polluted day, they could look on their phone and find out exactly how polluted it was. RB signed up a network of Uber drivers to measure the pollution in different parts of Delhi as they drive around.

The campaign was followed with a widespread social media rollout aimed at normalising mask use, because if residents were going to start wearing masks, it really needed to be seen as normal behaviour.

The increase in mask sales demonstrates the level of success. However, this project was about more than selling masks; using business to help solve some of society's bigger problems, and protecting people against pollution is at the top of that list.

Victoria Edmonds is director and Oliver Sweet is head of ethnography at Ipsos Mori



4.2 million people die every year as a result of exposure to outdoor air pollution (WHO)

America the unsure

In the US, relentless national optimism is being challenged by growing uncertainty. By Mark Potts



The American character to date has been marked by a sincere optimism. From the first 16th-century colonists to the waves of immigrants that arrived since, crossing oceans to set up life in a new land required an unusual belief in positive outcomes and a heightened tolerance for uncertainty. These traits put freedom in the hands of the people, men on the moon, and the digital world at our fingertips.

But this intrinsic optimism has been taking a battering. Across the political spectrum, there's a sense of unease about where the country's going and its place in the world.

By almost all measures, the US economy is going great guns. Unemployment is at its lowest point in 50 years, consumer spending is strong, wages are growing and GDP is running at around a healthy 3%. Yet, according to Gallup, only 31% of Americans are satisfied with the way things are going.

To get under the skin of this, Bamm interviewed a number of thinkers, including the Yale psychologist Paul Bloom; one of the economists who worked on Obama's Council of Economic Advisers, Christopher Carroll; and the Wharton neuroscientist Michael Platt.

Though the country as a whole has fully recovered economically, the echoes of the Great Recession can still be felt – something economists call the 'scarring effect'. A decade after the downturn, consumers are still more conservative in

their approach to savings and credit. The savings rate sits at 6.5%, more than twice its level in 2007, and it's hardly moved over the past few years. One reason is very human – our brains are, in a large part, wired to monitor uncertainty and learn from it. It perhaps shouldn't be surprising that one of the most uncertain and chaotic events in most Americans' lifetimes still plays upon behaviours today.

Today, the top 1% of earners own around 40% of all US wealth and the country's top 200,000 families own about as much wealth as the bottom 90% of all Americans combined. The country hasn't lived this far apart since the Gilded Age. This isn't just about a wealth gap, however. One of the lasting effects of the recession has been an increasing anxiety divide, or 'uncertainty inequality'. Looking at CDC data, stress levels for low-income consumers grew noticeably in 2008/09 and continued to increase at roughly the same pace up to today. For high-income consumers, there was little to no effect. Today, low-income consumers are 12 times more likely than those with high incomes to feel psychological stress. The disappearance of traditional construction and manufacturing jobs, the slow elimination of healthcare and retirement benefits, and feelings of structural unfairness that were magnified from the recession are all contributing to a feeling of uncertainty.

Most Americans also feel that the

country's place in the world is becoming unclear, with China, Russia, North Korea, and Iran casting shadows on the national psyche. A recent Pew study found that 60% of the country believes that, over the next 30 years, the US will be less important in the world. China is perceived as the big threat, with 62% believing that the amount of US debt China holds is a serious problem for the country.

Despite the current administration's tepid approach, climate change is casting another shadow. According to a recent Yale University poll, 73% of US consumers believe global warming is happening. This shouldn't be surprising – the increase in unusual weather events, such as last year's wildfires, is being felt by communities across the country.

The recent talk in marketing has focused on brands taking positions on critical issues, even those with a political edge. In a country where feelings of injustice are increasing, there's merit in that approach. But there are also stories to be told about America – its history, diversity and strengths. The human mind hates uncertainty, and will go to great lengths to reduce it. In such uncertain times, brands might want to take the opportunity to help consumers do this. They might want to inject some optimism back into America.

Mark Potts is global strategy director at Bamm

"I began changing my media sources and being a lot more deliberately conscious about the way I consumed the news to get a more balanced and accurate picture of the world," says Jackson. She discovered solutions-based journalism, which typically includes stories about innovation and responses to social problems.

After changing her 'media diet', Jackson began a Master's in positive psychology to understand the role concepts such as hope and optimism play in encouraging people to act on the information they take in, and has written a book on the subject – *You Are What You Read*. Her research found that, rather than being apathetic to world affairs, people were switching off because the news made them feel depressed and hopeless.

It comes as people are increasingly aware of what they consume and the impact on both their health and that of the planet – the rise of veganism being one example. Could this extend to monitoring our news intake?

"There's a difference between being a consumer and being a conscious consumer," says Jackson. "When you're a conscious consumer, you become more deliberate – you might even inconvenience yourself for deeper values behind the decisions you're making."

While fake news and misinformation have become pressing issues for government and the media, Jackson isn't advocating switching off from media – it's about becoming more selective.

With an infinite amount of news published daily – Jackson cites the *Washington Post's* 500 stories a day – staying informed comes with the trade-off that we have the sense of never being finished. There's always more to read and always further to scroll.

"We're both over-supplied and under-informed. That combination makes me want to tune in less often, and go in more deeply," says Jackson.

Tom Johnson, managing director at insight and foresight consultancy Trajectory, says the company hasn't seen any evidence of people choosing to use technology less – rather, we

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develop mechanisms to "manage the intrusion better".

However, he adds: "The attention people pay to politics has fallen very sharply over the past year. Outside of Westminster and those fascinated by politics, people are bored of Brexit; in the first three months of 2018, 39% said they paid a great deal of attention to politics, for the same period this year that was 20% (Deltapoll). This could be the environment in which other kinds of journalism become more valued."

Slowing down

A new breed of media outlet has emerged to capitalise on this information overload, adopting a 'slow journalism' model of publishing fewer stories in greater depth. Tortoise Media, the news start-up established by former *Times* editor and BBC News director James Harding, promises to run no more than 'five concise pieces' in its 'slow newsfeed'.

While it remains to be seen whether Tortoise will be commercially sustainable, there seems to be an appetite for a more sedate, considered approach – as shown

by titles such as *Delayed Gratification* and the increasing popularity of long-form podcasts (see boxout).

Denise Turner, director of insight at newsbrands marketing organisation Newsworks, says the on-demand media landscape has given people more choice, but this means people are more discerning in what they watch or read. "Media is now any time, any place. There aren't such fixed times when people do things any more. People can choose what they want to do when they want to do it. If you're going to invest your time, you want to make a good decision."

Neuroscience research commissioned by Newsworks found that when people made a choice to consume a particular medium, rather than just happening across it, they were more engaged with what they were reading.

Questioning faith?

Declining trust is often cited when exploring people's relationships with media. But an Ipsos report in January found no evidence for a crisis of trust in the

brands have an identity – they stand for something," says Andrew Tenzer, director of group insight at Reach. "We live in a world where, because of social media, bias is considered a bad thing – actually, bias is really comforting to people. You've a firm idea of what your news brand stands for and you go there because it aligns with your world view."

In contrast, while social media platforms are grounded in the idea of 'community', Tenzer argues that they lead to 'context collapse' because they are lacking the established norms and boundaries of offline communities. "The context and certainty that exists in real communities just collapses."

Reach is also trying to understand whether its audiences, particularly younger audiences, actually want to read a cross-section of viewpoints. Tenzer is sceptical: "I'm not sure that people are that rational that they want to read different opinions – I could be wrong."

The role of social media in creating myopic 'echo chambers' has been blamed for the rise of identity politics. But is it simply human nature to want to revert to those we already agree and identify with? Theodora Sutton, a DPhil student at the University of Oxford's Internet Institute, says her research with a community in California found that people there were "avoiding news partly because they were left wing and the news featured a lot of troubling information to them, and news updates were so much more frequent than they used to be".

Whether people are switching off or not, self-preservation is becoming more important as we become more aware that consuming lots of information is not the same as being informed. With so many question marks over the country's future, there is a role for longer-form, thoughtful journalism, Turner thinks. "In a world where there's a lot of uncertainty, people need to know 'why' and have a bit of analysis. I don't just need to know what the latest vote in the Commons was – what does it mean? It's not that people are always desperately interested in politics, but people want a bit of guidance."

Take a breath

According to *The Origin of Slow Media*, published by Jennifer Rauch in 2011, slow media questions the desire for "ever-more information and ever-faster communication" and "espouses the practice of 'slowness' in media production and consumption, which shifts use toward slower activities".

- **Delayed Gratification:** Published quarterly and dedicated to taking a deeper look at world events, *Delayed Gratification* revisits key events to analyse a story when the dust has settled, and the rest of the world's media has moved on.
- **Podcasts:** The trend kicked off with *Serial* and has kept on growing – there are podcasts dedicated to exploring everything from what it was like to live through the Watergate scandal (*Slow Burn*) to bizarre bedtime stories designed to lull you to sleep (*Sleep with Me*).
- **Slow TV:** Last year, the BBC obtained the rights to *The Ghan*, a three-hour documentary of a train rolling through Australia. The programme attracted 400,000 viewers when it ran in Australia in January 2018, so broadcaster SBS broadcast a 17-hour uncensored version a week later.



Original photography by Will Anlot

A working life

The foundations of modern working life are cracked. Twitter's European boss, Bruce Daisley, wants to challenge the way we all work to boost our productivity, creativity and happiness.
By Katie McQuater

Bruce Daisley thinks we are sleepwalking into a crisis of our own making. Technology has blurred the lines between work and home life so much, he says, that we're all more overwhelmed and exhausted than ever. "The really critical thing is that we're in the zone where we're not enabling creative thought – the sort of stuff we need over the next few years."

He is on a one-man mission to change that – even if it means unpicking assumptions about work that are so deeply ingrained that we barely stop to question them.

Daisley may seem an unlikely candidate to be questioning the role of technology in our lives – as vice-president of Europe, the Middle East and Africa (EMEA) at Twitter, he's in the thick of it. And while there are many tech executives who don't use their own social networks – Facebook's Mark Zuckerberg, for instance, has a carefully crafted personal page, run by a team of moderators – Daisley, who tweets often and honestly, isn't shy about his affection for the platform. "I've always loved it. It makes me laugh every day and it's my main source of news."

Daisley joined Twitter from YouTube in 2012, as the microblogging website's first UK managing director. In 2015, his

remit was expanded to include EMEA. "We've been on a fascinating journey – it's been a fun place to work," he says.

Historically, that has been the perception of companies in the tech industry – fun places to work. Exciting, dynamic, filled with highly paid, creative employees brimming with ideas, hacking and solving problems in plush offices designed to meet their every need, from snack bars to games rooms. While some of that may be clichéd assumption, it certainly seems like an appealing place to be at surface level.

Yet tech isn't immune to the strains faced by other industries – long hours, stress and toxic working cultures. Blind, an anonymous network for tech industry employees, conducted a survey in May 2018, in which more than half (57%) of 11,487 respondents said they were suffering from workplace burnout. In addition, Bima research published in April this year showed that 66% of tech industry respondents are stressed by their work – 13% constantly.

Indeed, it was poor workplace culture at Twitter that spurred Daisley into action. "There was a time, a couple of years ago, when the culture at Twitter wasn't as good as it had been." He noticed that people seemed drained, as if they weren't enjoying their work as much as they had previously, while others were leaving. "I found myself trying to understand what I could do – as sort of nominally a boss – to fix the culture."

Such was the impetus for Daisley's foray into the science of working well – a journey that began with the launch of his business podcast exploring the topic *Eat Sleep Work Repeat*, and that has

just resulted in him publishing a book, *The Joy of Work*. He says he did it for himself in an attempt to understand more about the subject and figure out the best approaches to work. "What I found is that there are no books on it – so I started doing the podcast out of self-education more than anything else. I was reading little articles mentioning these experts' names, but I couldn't find anything about them, so I wanted to chat to them."

While there is a huge body of evidence on work and what makes it more fulfilling and productive, very little of the research Daisley came across was being applied in real working environments and businesses. In fact, the reality of work often runs against the advice of organisational psychologists and other experts.

"A lot of the stuff that experts recommend is the opposite of what happens in work," he says. "The science against open-plan offices is really powerful, but I suspect every person who reads this article sits in an open-plan office." Likewise the evidence against spending too much time in meetings is strong, but many find their working week dominated by them.

"It seems that every time you look at the evidence of the best ways of working, it's the opposite of what we should be doing. Yet these things are unchallengeable foundations of the way we are working."

Manifesto for change

His book is timely; more attention than ever before is being placed on mental health in the workplace and there is increasing awareness of how our relationship with technology is changing our relationship with work. Likewise, flexible and remote-working arrangements are more commonplace in the digital and marketing industries, although there is still a long way to go before such practices become the norm.

As is often the case with manifestos for change, however, the solutions to some of today's workplace problems – many of which Daisley sets out in his book – are often dismissed as being unrealistic or unworkable in practice. There's also the damaging narrative, held by a minority, that the new generation of millennial and Gen Z workers are simply too demanding of employers, and are actually just work-shy 'snowflakes'.

Bankers, for instance, have always done punishing, demanding hours, so when there was an increase in workers collapsing and having breakdowns, the industry old guard dismissed it as part of the territory, says Daisley. "The veterans of the banking industry were like 'this is a snowflake generation, they can't handle it'. But the fundamental difference was that, when you did a 120-hour week before, when you left the office you were off. You were only out of the office seven hours a day, but you were switched off," he adds.

"Now, they are connected to their phones – and that fundamental difference turned something that was brutal but sustainable into something that is brutal and unsustainable. It wasn't that somehow the DNA of workers had changed but that the invisible demands were often neglected, and were taking a toll."

This belief that a new generation of workers are somehow less capable or less hardworking is just one example of what Daisley calls a 'mill-owner mentality' residual among some business

leaders. "Someone described it to me as 'I'm one of the good guys, but inside me is an 18th-century mill owner' – and I think we all, to some extent, have a part of us where, if people aren't at their desks at a certain time, we're thinking: 'They're not online, are they taking the piss?' We presume that other people aren't working as hard as we are – and it's taking us the wrong way."

So what's the biggest change Daisley has implemented at Twitter as a result of all of this research?

Before writing the book, he – alongside Sue Todd, chief executive of marketing agency Magnetic – compiled an eight-point manifesto on 'the simple ways to improve work'. The first point was 'presume



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permission', prompted by a member of staff at Twitter asking Daisley if they were allowed to go home to finish a task if they were struggling to finish it at the office – as the company doesn't have a 'working from home' policy.

"I thought: 'God, how embarrassing; we've basically got people putting their hands up to go to the bathroom and people not knowing what they're allowed to do,'" says Daisley. "We've turned this 30-something into a child. I just said 'presume you've got permission to do stuff. Get on with it.'"

While it may seem obvious, however, the freedom to proceed until apprehended isn't so readily available in all organisations.

People won't presume permission unless they feel secure, which is something Daisley talks about a lot – psychological safety, or giving people the benefit of the doubt. It's one of his big talking points, and a feeling he strives to create at the tech giant – because Twitter is facing bigger worries than whether or not its staff can work from home.

Like all of the big social media firms, the company's dealing with various, well-documented challenges – from heightened scrutiny by governments and regulators over data privacy to how it handles harmful content. One of Daisley's biggest priorities is making sure people who work there are able to say what they think, even if they are the most junior person in the room – which he says is critical to addressing these big questions.

"It's making sure we've got people's backs on the decisions they make, but also being rigorous and honest. One of the most important things is building psychological safety – that's the ability for someone to say 'guys, this isn't good enough'."

"It's very easy for any company to have groupthink, where you just go along with what one person says.

"If you're going to have rigorous analysis, if you're going to have effective decision-making, anyone in the group – often the most junior person – has to have the freedom to say 'I don't think that's the right way to do it.'"

Quiet voices

It's refreshing to hear a tech executive talking about breaking out of groupthink. In an industry infamous for its Silicon Valley 'bros' and a platform where women disproportionately experience trolling and abuse, I ask Daisley if he thinks Twitter would be different if it had been designed by a woman.

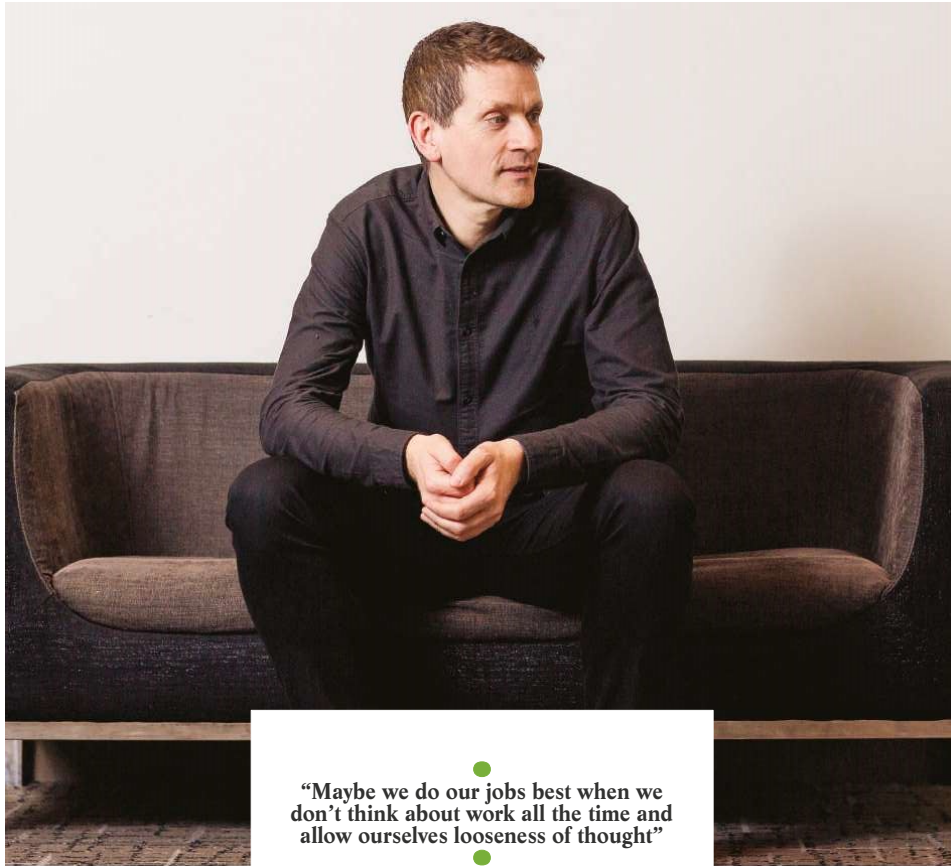
"Some of our leading developers are female, so I wouldn't necessarily say so," he says. "The one thing we've been very focused on over the past three or four years is ensuring quiet voices are heard – which is one of the things Twitter does when it's at its best."

All platforms, whether they are TV panel shows or social networks, have a responsibility to make sure they're not prizing the loud male over voices that perhaps aren't as vocal, he adds. Some may argue there's further to go to redress the balance on Twitter, but Daisley says: "What we've tried to do is ensure that female voices are heard as powerfully as male ones. We've worked hard to do that. It's a constant process. I don't think the platform would look different, but we've tried to ensure one form of communication doesn't win over another."

Another of the challenges facing Daisley at Twitter – and, he says, anyone looking to make a big change at work – is 'learned helplessness'. This is when we believe that others just don't understand the everyday realities of our job.

"I was chatting to people at an ad agency the other week," he recalls, "and they said: 'You don't understand our job – we can't just have an evening off email!'"

In a way, this conundrum affects all parts of society; from building more inclusive workplaces to living more sustainably, many people feel their hands are tied and they can't make the requisite changes. It's the age-old frustration for researchers that



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the evidence is there but it isn’t being listened to. Daisley thinks the problem lies with people in positions of power looking to guard against unstable times by sticking to the status quo.

“The highest paid person has come up through a different work environment to the one that exists now,” he says. “Often, when there’s uncertainty around us, we want to assert control, so people who are surrounded by instability at unprecedented levels want to assert the best way to get more control on it. That’s the critical thing: we want to push back against that – and research is one of the ways we can do it.”

When it comes to small changes that individuals can make, it may seem paradoxical for a senior executive at one of the world’s biggest tech companies to talk about reducing the time we spend on our phones.

Daisley believes this is exactly what needs to happen, however, to redress our relationship with technology, reduce stress and foster more creative thinking. Turning off notifications on your

phone, he insists, is “one of the biggest things you can do to liberate yourself”.

A third of British people think about work the moment they wake up, he says – so we need to find ways to break out of this. “Maybe we do our jobs best when we don’t think about work all the time and allow ourselves looseness of thought. Our brains often find creativity not in an overscheduled 80-hour week, but rather in finding looseness.”

Daisley himself works best when he doesn’t layer more guilt on himself for not following his own rules. “One of the things I advocate is taking a lunch break – but if I only take three lunch breaks a week, I don’t beat myself up about it. Instead, I think, ‘well done for having those three.’”

“The perpetual state of modern work is guilt – you’re guilty that you didn’t get back to someone; you’re guilty that you weren’t paying attention in that meeting – and reducing the amount of guilt we feel is a good thing.”

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Shattering stereotypes

Inclusion and diversity have risen up the business agenda. But tackling stereotyped thinking about customers is not only ethical, it also leads to better business and is a creative force in product and service design. By Tim Phillips

Jessica Anderson, a nurse in the acute admissions unit of the Royal London Hospital, completed the 2019 London Marathon in her uniform in three hours, eight minutes and 22 seconds, raising £2,399.72 for charity in the process. Guinness World Records (GWR) denied her the record for the fastest woman running the distance in a nurse's uniform, however. The reason? Its rules demanded a 'white or blue dress, pinafore apron and white cap'.

A week later, having taken a kicking on social media, GWR changed its mind, saying its guidelines were 'outdated, incorrect and reflected a stereotype we do not in any way wish to perpetuate'. GWR's oversight may be because few people in its daily operations are focused on whether its rules perpetuate stereotypes - though one would assume that has now changed. But even large, research-driven organisations fall flat on their faces.

One of the most infamous examples came on International Women's Day in 2012, when Bic launched an ad with the excruciating copy 'Look like a girl, act like a lady, think like a man, work like a boss'. The product outdid the advertising: it was a new line of pens... for women. The difference between the new pens and plain old 'male' Bic pens was that these ones were pink. Hilarity ensued as women posted pictures of themselves holding signs written using their new Bic pens. 'It's a miracle!' read one. 'I wrote this all by myself,' said another.

While both brands took criticism for their stereotypical views, any post-mortem has to ask - how did no-one notice? The uncomfortable truth is that stereotypical thinking has been pervasive in business for decades, and continues to drive much of sales and marketing.

It's bad for the people who are treated as stereotypes, it's bad for society, and it's bad for businesses in every way if it means that they are developing inadequate products and services - or none at all - for entire groups, failing to spot opportunities to innovate, or offending their customers.

"Using stereotypes reveals a failure of the insight-generation process," says Sam Knowles, founder of Insight Agents, a corporate and brand storytelling

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consultancy. "Insight, to me, is an expression or manifestation of empathy. That profound understanding allows us to get inside the mindset of those we're looking to influence."

"Of course I'm going to say that stereotyping is wrong, but there are specific ways in which it's wrong," says Dr Marie-Claude Gervais, co-founder and research and strategy director at Versiti, a consultancy specialising in strategic research around diversity and inclusion. "First, people treated in this way feel misrepresented, misunderstood - sometimes even

offended. Much like women don't like being portrayed as exclusively sexual objects, people from diverse ethnic backgrounds also resent being typecast in a narrow set of roles. But it's also a problem for customers, because they might not find brands or products that meet their needs."

An example is the work that Versiti has done for Estée Lauder, examining the make-up choices available to black, Asian and Chinese women, and whether the cosmetics are too focused on a stereotypical, light-skinned customer. The

research found large gaps in the range of colour foundations and helped make Double Wear one of the bestselling foundations in the world.

"It is also a big problem for society more generally if some groups of people feel disenfranchised," Gervais says. "It leads to less community cohesion and, possibly, more extremist views. Within organisations, it leads to loss of talent."

Versiti is currently helping a luxury car brand to understand the perceptions, needs and preferences of ethnic minority consumers, to challenge stereotypical internal views of who its customers are (middle-aged,



white males), and investigate how that manifests itself in the way it communicates.

“I am doing escorted visits to high-end car dealerships to observe, and speaking to ethnic minority customers and dealers who are from ethnic minority backgrounds. They confirm what I’m observing and what customers are feeling. With the best intentions, a receptionist in a dealership took a look at young Asian car buyers and thought they were not on brand because they were wearing tracksuit bottoms and designer trainers. They are 15 years younger than they expect, so they don’t even bother to greet them. That customer will never come back and – because word of mouth is powerful – they will spread the news,” she says.

It’s a powerful reminder that brand image is mediated and communicated by customers and by those potential customers who feel excluded. This is a failure to connect with potential and future customers that has its origin

in a narrow, often out-of-date view of what the brand represents. The staff who are the custodians of a luxury brand’s values may implicitly (or explicitly) jump to the conclusion that marketing to certain groups would ‘cheapen the brand’, for example.

Dr Gervais’s experience is that it takes a challenge from external experts – using research and insight – to effect change in this type of thinking. Undermining stereotyped thinking about customers, however, is ethical, leads to better recruitment and internal communication, and – used well – is a creative force in product and service design.

How does the research respond? Ben Skelton, CEO of Quadrangle, says: “One of the main functions of research is to embrace the human story in all its wonderful complexity, but also to help the users of research access it in simple and enabling ways.

Focusing on this means that, theoretically, you step beyond seeing people as types or expecting them to follow patterns based on predefined behaviours or cultural assumptions.”

If the challenge to brands is to break out of stereotyped thinking, the challenge to researchers is to make research truly inclusive, Skelton says.

“We have to think about changing techniques. These include coding questions in ways that target recipients will respond to best, or ensuring sample recruitment is properly inclusive. We also need to make sure we’re not working off assumptions made because there are not enough diverse voices in the room. For example, when there are focus groups that clients want to attend, they are often arranged in London, so they end up with a more extreme urban bias. As an industry, we need to get better about addressing issues like this.”

Of course, it is possible for brands and researchers to have the best intentions, but still fail to understand the needs and experiences of groups, because they come from a dominant culture. “I think it’s less that they don’t engage fully and more that they can be unaware of the ways in which they’re not engaging fully, and where they’re getting it wrong,” Skelton says. “This is in no way to diminish the issue or onus of responsibility. It is totally on us as an industry to get better at this.”

Georgina Lee, co-founder of The Age of No Retirement (TAONR) wants brands to get much better at designing products and services for seniors. As she points out, with luck it’s a group we will all be part of at some point. The trouble is, we might not like it much when we’re in it. “There’s this popular image of people turning 50 waiting around for dementia. When, in reality, today’s 60-year-olds could still have a career ahead of them,” Lee says.

Trying to undermine this narrative, TAONR commissioned research into 2,000 people of all ages, to understand what unites and divides the generations. “We had an instinct that we have more in common across the ages than separates us. What we found was beyond our wildest hopes – across every group, 84% of us do not want to be defined by age,” Lee says. The results (see p32) show remarkable commonality across all ages in a variety of questions that influence design, leading to the report’s 10 ‘intergenerational design principles’.

For many years, Lee ran a design consultancy, and argues that design thinking should be inclusive for young and old. She tells the story of the Ford Focus, a car designed originally for older drivers – easy to drive and to get in and out of. In development, testers wore a customised ‘third-age suit’ to mimic lack of mobility. The result was a car that was successful with all ages, because (not surprisingly) younger people also liked a car that was easy to drive, and to get in and out of.

Lee argues that our obsession with age-based demographic targeting, from Gen X to millennials, “defies logic”. TAONR research shows that, across all

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Who fails the Riz Test?

The Riz test asks five questions. In a film or TV programme with at least one identifiably Muslim character, is the character:

- 1** Talking about the victim, or the perpetrator of terrorism?
- 2** Presented as irrationally angry?
- 3** Presented as superstitious, culturally backwards or anti-modern?
- 4** Presented as a threat to a western way of life?
- 5** If male, is he presented as misogynistic, or if female, is she presented as oppressed by her male counterparts?

If the answer to any of these questions is “yes”, the film fails the test. It is no surprise to find that a film such as *Taken* (2008), in which Liam Neeson battles evil Muslims who kidnap European girls and sell them as slaves, is a 5/5 fail. More troubling is that fantasy and superhero cinema often uses Islamophobic tropes as lazy plot devices: *Iron Man* (2008) is a 5/5 fail, *Black Panther* (2018) fails in two categories, and *Batman v Superman* (2016) fails in three by inventing an imaginary country beset by Muslim terrorists.

But the worst recent offender? *Bodyguard*, the most popular TV show of the past decade. It is a 5/5 fail within the first 12 minutes of the first episode. “Jed Mercurio is an incredibly talented writer, but he seems to have let himself down here,” Shaf Choudry, who created the test, says diplomatically. He now uses it as a case study in his Riz Test workshops.



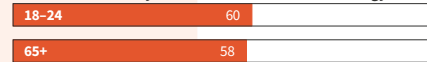
How different are young and old?

Surveys of young and old show a remarkable commonality in response to questions on topics – use of the internet, feeling overwhelmed by technology, attitude to politicians – which are commonly considered to have a strong age-based skew.

The internet is part of my life – I'd miss it terribly if it wasn't there



I feel overwhelmed by the constant flow of new technology



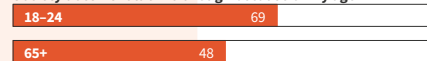
Life is too fast these days – everything should slow down



Politicians don't care enough about people of my age or background



Society doesn't value me enough because of my age



When shopping, I use online search a lot



I try to live a healthy lifestyle



Source: Age Does Not Define Us, download from www.ageofnoretirement.org

Base: Online survey of 2,000 adults, aged 18 to 99

ages with no statistical variation, 86% of people wanted to see the design principles in action, but only 16% said they saw products that adhered to them.

“If you design well you’re not compartmentalising your customers into age-based demographics; you’re designing from an ageless perspective,” she says.

This is not just a challenge to designers, says Marisa Tuffnell, partner and customer insight manager at John Lewis & Partners (JLP). Advertising and marketing practitioners can also be drawn from a narrow demographic. “Sometimes, we’re in our little bubbles and it can be hard to look beyond them. It’s important not to stereotype specific groups and make assumptions about them, especially if you’re not that close to them... but the average age of a member of the IPA [Institute of Practitioners in Advertising] is 33, and less than 5% are over 50, so they are often in different categories from the people they are trying to target.”

Recently, a consultancy came in to JLP to discuss the impact of demographic trends in retail, and how to address growing customer segments. One of the slides showed the increase in the number of consumers aged over 65.

“The icon used was a stooped person with a walking stick,” Tuffnell recalls. “I don’t think that’s helpful.”

Group identities

Stereotyping is complicated because our group identities may feel positive or negative – often depending on whether they have been pushed on us or actively sought. At some level, we are all compartmentalised. Sales, product design, innovation and marketing are not done for audiences of one, so – at some level – it becomes important to guess that a person is comfortable being identified with a peer group in some way. If the guess is good, it is tolerated or even liked by customers – the brand has tried to be empathetic, even if that is not always successful.

And while we may dislike being stereotyped, we all want to belong to defined groups at some level, even if that means altering our behaviour to conform to its values. Researchers, not least those looking to influence behavioural change, have discovered the power of group norms in influencing our preferences and choices, as Crawford Hollingsworth and Liz Barker have written about for Research Live.

Individuals may have many group identities, not all of which are salient, drive purchasing behaviour, or are easy to see in the available data. This means that any segmentation fits some customers better than others.

In the past, lack of data meant that demographic distinctions were a least-worst option for segmentation.



No one has ever seriously believed that all people between 18 and 25 share identical preferences while no one outside that demographic shares them – but they were a better-than-nothing proxy for certain preferences, which increased profitability if groups were targeted in this way. As consumers, we have long tolerated inappropriate, demographically inspired marketing and advertising – perhaps because we had low expectations; perhaps because advertising and marketing have been a relatively small intrusion in our lives. As marketing messages become increasingly intrusive, however, so they also need to become more appropriate.

Combining customer-tracking surveys with operational and sales data offers the potential to identify what motivates us, rather than just what demographic category we fall into. O2 is one brand combining those data sources to understand its customers in a more nuanced way. Sandra Fazackerley, director of customer experience at Telefónica, says: “We’re pushing ourselves really hard to get away from generic segmentation – family would be my example. Quite often in the marketing world, we have talked about family as a segment, and maybe in our minds that concept was mum, dad and a couple of children. We’ve learned from our data that it is so much broader. Grandparents can have children; there are blended families; divorced and single-parent families; same-sex families. The old way of advertising to families can be very negative in some people’s eyes. It’s just too stereotypical.”

O2 now prefers to consider a customer’s affinities, not just attributes. Discovering the things that customer likes offers the chance to segment based on preferences, but this is much more data-intensive, and requires knowing the ‘why’ as well as the ‘what’. The reward is that customers are more likely to respond to messages positively, because they feel they have been heard. Fazackerley explains that affinities must be “the things that people have a strong bond with. So I might like football, but my affinity is with Manchester United. That step is hard to get to.”

Not all of this can be intuited by choices, but some can; for O2, some affinity may be as simple as discovering that a customer consistently prefers Apple or Android, which immediately narrows down the offers they are likely to appreciate.

The availability of bigger and better data may mean an overdue end to demographic segmentation. But we should also worry about the extent to which stereotypical thinking can be passively enabled or encouraged by digital services.

In the past, landlords placed signs in their windows:

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“Affinities must be things that people have a strong bond with. So I might like football, but my affinity is with Manchester United”
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‘No blacks or Irish’. In 2016, ProPublica, an investigative journalism site, posed as a landlord to buy advertising on Facebook in the US. It found that it could exclude African-American, Latin and Asian Facebook users from viewing its apartments-to-rent ads. This wasn’t a bug; it was a feature of the Facebook platform – or, more precisely, its ‘ethnic affinity’ marketing product.

As Facebook later pointed out (after it had hurriedly disabled ethnic affinity for housing ads), ‘ethnic affinity’ has positive applications for marketers who want to actively target particular groups, rather than just exclude them. It’s just that this particular unintended consequence was not only racist, it violated the Federal Fair Housing Act of 1968.

Machine learning creates more difficult-to-fix stereotypes in decision-making. The problem is that expert systems need to be trained, and much of the training data confirms stereotypes,

especially when using images. Training using datasets – such as stock photos that embrace stereotypes (female scientists wearing glasses, business people that are male and wearing suits) – risks embedding those stereotypes in the next generation of products and services. Tom Evans, director of data science at Kantar, gives the example of artificial intelligence (AI) that was trained to recognise and categorise people in images in the home. “In the training data, the only pictures of a kitchen had a woman in them, so the algorithm classified every person in a kitchen as a woman.”

“I’m looking to build intelligent algorithms to analyse film scripts,” says independent consultant Shaf Choudry. “One area of research is taking movie subtitles as a corpus of text to train how to communicate – but if these scripts are problematic in the first place we’re training our AI systems with biased data.”

Choudry knows more about this than most, because he is one half of the team behind the Riz Test, a simple way to identify Islamophobia in films and on TV (see box p51). It was created by Choudry and Dr Sadia Habib, a specialist in identity, because of their – and their friends’ – dissatisfaction with relentlessly negative media stereotyping. “It was a conversation many



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people were already having – we’re just providing a framework to capture and codify it. The conversation exists, but the data does not,” Choudry says.

The test was named after Riz Ahmed, an actor and activist who spoke passionately to parliament about the problems of media stereotyping in March 2017 (he has tweeted his approval of the Riz Test). The impact of stereotypes was that many young Muslims would “switch off and retreat to fringe narratives”, he argued at the time, unless they could see balanced portrayals of their community on screen.

Sense of community

In 2018, a wildly successful crowdfunding campaign raised £102,000 for the London LGBTQ+ Community Centre, a community-driven initiative to provide a shared space in Hackney. But the centre realised it had slightly different ideas of what that space would be. “It’s a very important time for this initiative because so many community spaces are being closed down, and this has contributed to increasing fragmentation among what is already a huge cross-section of people,” says Chris Illsley, a strategist at Flamingo. It wanted to answer the question: “How

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“We needed to speak to the people on the fringes, who traditionally don’t have this space – they bring a different lens and perspective”
 ●

could it built something that spoke to the needs of the LGBTQ+ community?”

First, it needed to attempt to define that community. Flamingo used a two-stage process: in the first stage, qualitative research among the many groups within the community found a longlist of values that the centre should represent. In the second stage, qualitative and semiotic research helped examine the participants’ unconscious associations of the attributes of a community centre (‘boringness’ being one), and to come up with the list of services the centre could offer.

“We knew we needed to speak to the people on the fringes who needed this the most,” Illsley says. “People who traditionally don’t have this space – such as older people, people of colour, disabled people. They bring a different lens and perspective to what it means to be part of this community.” Michelle Fan, Flamingo senior strategist for semiotics, helped this process. “When we have a lot of subconscious forces at play, I may have some stereotypical assumptions that I need to question. Semiotics helps us whittle them down into specific opportunities.”

Illsley adds: “As soon as you create something, it’s no longer owned by you. You create a framework the community will shape, so it is important not to hold on too tightly to your ideas of what it should be.”

This, they explain, inevitably introduces a tension,

Coca-Cola through the ages

Two years ago, Coca-Cola called a company meeting to discuss long-term trends that would affect it. One such issue was how it engaged with seniors. The racially and sexually diverse group that stood on a hilltop in its famous 1971 TV spot, singing ‘I’d like to buy the world a Coke’, would all be past retirement age now.

“We have been over-focused on recruiting a new generation; we never focused on seniors in our plans, in our merchandising. I think it’s a miss,” says Véronique Chéné, new beverages and innovation senior manager for Western Europe at Coca-Cola.

The company realised it understood little about what motivates seniors (65+) when selecting beverages – how they made choices, what design formats they preferred, and whether

they passed on their brand preference for Coca-Cola to younger generations. So Chéné asked Engage Research to recruit online communities of seniors to discuss their opinions on the topic.

“Seniors are a huge demographic – one that is growing – and it has money. You can’t say that about a lot of target audiences at the moment,” says Deb Sleep, director of Engage Research. “But there is a disconnect between the stereotype of age we have in the back in our minds and what we see in front of us.”

It was not hard to find online respondents – another stereotype of seniors. “The online community we ran had some of the best engagement levels we have ever seen,” Sleep said. “If you can’t find those people, you haven’t looked hard enough.”

In follow-up, internal Coca-Cola workshops, Engage encouraged participants to bring photos of seniors they knew, which “totally blew stereotypes out of the water. One person danced the tango and had just come back from three weeks in Cambodia; another baked bread for the community. But, in the back of many people’s minds, is a stereotype of a 70-year-old with a walking stick, glasses and grey hair,” Sleep says.

Coca-Cola’s work is driven by the insight function rather than strategy or marketing, but similar projects are influencing its innovation, advertising and marketing. Chéné adds. “We want to share the information broadly. Across the globe, we are making sure it will be in marketers’ minds.”



because when we think beyond stereotypes, there is no simple definition of an LGBTQ+ community, any more than there are homogenous communities of seniors, women or Muslims. “We had no idea how fragmented the culture is, and we should not homogenise it. But that means it becomes difficult to cater for the entire community in a meaningful way. There is way too much richness and culture. One of the insights we took back to them is inclusivity as an amazing value, but it’s not a strategy. We do not live in a society where we can do off-the-shelf thinking any more.”

“Using multiple research methodologies, this can be a powerful process,” Fan adds. “You can be concerned with the deeper questions of ‘why’, and really see where the culture is going. But even if you don’t have concrete answers to everything, you’re asking the right questions. That will push you in the right direction.”

“When people feel empowered to express their whole selves – and feel that it’s the expression, not suppression, of their point of difference that is being called upon – then we’re getting somewhere,” says Ben Skelton. “When that happens on projects, we can see a tangible difference in the quality of insight.”

Using customer closeness to break through stereotypes

Researchers need to create an environment in which individuals feel empowered to share their world view, invite insight into their culture and reveal why they feel the way they do. This is the only way to engage communities that are often sidelined or misunderstood because of their religious beliefs, race, sexual orientation, age, family type and gender identity.

Having deep links to an extensive professional network of social commentators, cultural lobbyists, semiotics experts, journalists and, of course, highly skilled socially aware researchers to tap into allows us to lay the right foundations for the work we do. This is how we uncover the ‘unknown unknowns’, particularly around structural prejudice, which often plays into the formation of stereotypes.

Some of our most successful results come through customer closeness workshops. Running these goes to the heart of Quadrangle’s most important customer consultancy principle: know

your customers and understand them as people. Workshops help a brand reconnect with what their customers think. Undeniably, they can bring some ‘and-breathe’ points and can be pretty humbling. Ultimately though, they have a series of light-bulb moments that push clients to a new point of discovery.

We equip our facilitators with a nuanced understanding of how certain stereotypes and unconscious biases have developed and the effect they create, both on the community depicted and on the dominant culture. This enables the right set-up and creates a trusted foundation.

The sessions are typically run across a formula that starts with ‘listening’, evolves to ‘asking’, builds in ‘observing’ and ends with ‘connecting’:

Listening – stakeholders watch focus groups to understand customers’ functional and emotional needs and ‘walk a mile in their shoes’.

Asking – one-on-ones and speed-dating exercises to allow stakeholders

to gain greater depth in areas key to them such as what ‘being inclusive’ really means.

Observing – understanding what matters to customers and building empathetic insight into the issues faced by participants through customer presentations.

Connecting – presenting proposition ideas to customers and getting the happy or unhappy emoji treatment live in the room... ouch!

Ironically, brands often treat diversity and inclusion as a stand-alone issue. This is counterintuitive. Not only does proper representation go to the heart of every aspect of a brand, it also plays into trust, personalisation and voice of customer – all fundamentals that brands need to get right to win in the post-digital customer landscape. Integrating greater cultural awareness into all projects through customer closeness workshops pays dividends.

By Alison Camps, deputy chairman and partner at Quadrangle



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Brewing for change

Premium tea brand Twinings has a disparate global footprint, so it had to work across all markets when introducing an innovation programme, as its head of marketing excellence, Catherine Coleman-Jinks, tells Jane Bainbridge

Tastes and trends in hot beverages have gone through many dips and turns. Historically seen as a nation of tea drinkers, the rise of coffee-shop culture in the UK has had a significant impact on the hot drinks we choose. While coffee has gained currency, however – whether because of connoisseurship or ubiquity – it has also faced challenges, as some people look to limit their caffeine intake as part of an increased focus on wellbeing. Tea may not have fared so well in the out-of-home environment, but fruit and herbal teas have benefited from the health and hydration spotlight. It is within these relatively complex market conditions that Catherine Coleman-Jinks, head of marketing

excellence, international marketing, at Twinings, has found herself navigating a global brand portfolio that covers Twinings and Ovaltine (known as Ovomaltine in international markets).

A food marketer all her life – starting as a graduate at United Biscuits before a long stint at Kraft – she joined Twinings in 2012 after working as a consultant.

Coleman-Jinks describes Twinings as a “very grown-up organisation, with people coming from many different backgrounds culturally”.

“We’re a completely decentralised culture. We’ve got 10 countries, all doing things very differently – but what we’re not doing is sharing best practice and learning across those markets. Although we don’t want to become a centrally led business, we do want to share and learn where we can, and adapt,” she explains.

This was partly the spur for her introducing a new way of working to boost innovation across the business.

“We needed to grow more of our business through innovation and new products. Not just launching a small new flavour, but through new occasions and different formats – the real step-change stuff,” Coleman-Jinks says.

At Kraft, there was a precise template

and process that everyone followed for innovation, she says, but this didn’t exist at Twinings. “We had none of that. Every team was working very differently.”

So, Coleman-Jinks called in the expertise of brand, innovation and insight consultancy Brand Potential, and its managing director and founder, Mary Say, with whom she’d worked before. They started by looking at how many other organisations – from car manufacturers to FMCGs – went about innovation and decided that Twinings needed a three-year plan, to build the team’s innovation capability and establish a process that would work for all regions.

Say explains that the Brand Potential agenda had three key aspects: creating the right culture for innovation for the big-ticket, high-profile ideas; making sure there was the capability within the business, and that people were equipped with the right tools and techniques; and harnessing their creativity by building confidence.

“Those three things had to work across all markets and across both brands – Twinings and Ovomaltine – which were performing quite differently commercially,” explains Say.

“The marketing communities had different agendas because some were in a growth mindset and others weren’t. The challenging thing was that the businesses needed to pick up the framework we were providing and take it back to their own markets to implement themselves. This wasn’t a classic, global enforcing way of working – more of a coaching way of working.”

For Coleman-Jinks, it was particularly important that the framework was adaptable, because her experience at other companies had shown her how limiting a rigid framework could be. “My frustrations when I worked at other places was [the attitude of] ‘Here is the framework, you stick to it. Tough,’” she says.

Say adds: “We set up all the stages within it, and then – over the three years – we moved down the funnel. Phase one is clearly identifying the spaces and the opportunities where you

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“We don’t want to become a centrally led business, but we do want to share and learn where we can, and adapt”
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want to take your business.”

This affected how insight was used within the organisation – moving from a system that had been quite back-ended on quant and concept testing to more front-ended, needs-based insight.

The second year focused on injecting creativity into the process.

“We invited every market to bring a live project into the programme so they could take all the tools and techniques created the year before and deal with a particular challenge in a live-action format,” says Say.

“Year three was the nuts and bolts – building go-to-market strategies. How to optimise your concepts and not just rush to execution; being clear on the consumer need you’re targeting; getting the stakeholders on board; new creative and design techniques; naming and sub-branding, and so on.”

During this process, Cold Infuse – Twinings’ new cold-water infusion for water bottles – started to come through, and its development ran in parallel with the company building this new way of exploring innovation.

Coleman-Jinks says everyone has learned a lot going through the process for the first time and that, for future new product development (NPD), it will be faster and better. “With Cold Infuse, we went on quite a few little detours to get to where it was, while we were all learning. The next thing to come out is in Brazil, in confectionery – a completely different category. It’s been a much faster, simpler way of working to get that out of the door,” she explains.

The timing for Cold Infuse has been spot-on. When the company first considered the product, water bottle carrying in the UK was relatively low – although it was much higher in Australia, which was the lead market for this product. In recent years, however, the use of water bottles in Britain has exploded.

Twinings has master blenders on site, who create its blends from scratch



“We talk about building big strategic innovation platforms and they must be fuelled by insight”



White black tea is having a challenging time, fruit and herbal teas have done better

wellbeing beverages within tea. We’ve seen that pretty much across all our tea markets.

“It’s traditional black tea that’s stable or in decline, depending on the market – in the UK, it has been in decline. Everyone says, ‘millennials don’t drink tea’ – they do; they just have a really broad repertoire.

“I was in some consumer groups a couple of weeks ago, in the States, and the dynamic is quite interesting. Some of them say, ‘Oh, I start my day with a cup of black tea,’ and someone said, ‘I start with green.’ It’s doing the same thing – it’s just their first cup of tea. Twenty years ago, everyone would have said black tea, so I think it’s an exciting category. There is lots of opportunity.”

Coffee-shop culture is entrenched in the UK now and, with it, the idea of going out and buying a hot beverage. How does that affect the in-home market for Twinings?

“I worked on coffee just before the coffee-shop explosion, in the early 1990s. Coffee was really boring then, no-one was interested in it. Then everything shifted, all driven by what people were doing out of home,” says Coleman-Jinks.

“At Kraft, we launched Tassimo as an in-home solution, and Nestlé launched Nespresso, and everybody jumped on the in-home version. We haven’t seen the equivalent of that in tea. Tea out of home is still not that interesting. You go into Costa and get a teabag in a cup for £2.

“As an industry, we need to bring value to it – through things such as Kombucha and other more interesting tea-based drinks.”

Coleman-Jinks points to two dynamics within the category: the flavour-led element, where people who want something a bit healthier opt for flavoured teas and infusions; and the

“A couple of hot summers, various influencers, *Love Island*, schools making kids bring them in – many things have happened that have meant water bottle ownership and regular use have increased dramatically. So we’ve been in the right place at the right time,” says Coleman-Jinks.

With this change-in-use occasion, however, there was much debate about where to site Cold Infuse – should it be with teas or with flavoured waters?

“In the UK, it sits on the tea aisle. In Australia, they’ve done more dual siting, and put it at checkouts,” Coleman-Jinks says.

When it comes to the implementation of the innovation framework, Say says the biggest challenge was people’s concern about time – that the programme would slow them down. It was important they saw that, by investing the time upfront, it would save time further down the line, she adds.

“This is all about using [market research and insight] as an upfront strategic framework. We talk about building big strategic innovation platforms and they must be fuelled by insight. So, for each market, we went in and ran consumer co-creation to build the platforms, and took clients with us into the co-creation. We didn’t go after Twinings’ conventional target audience, as it was about pushing the boundaries, so we recruited forward-looking consumers.”

Looking beyond classic audiences and focusing on NPD has been a necessity within this changing hot-beverage market, although the macro trends can vary regionally.

“A lot of people think it’s declining, but it’s pretty solid across most markets,” says Coleman-Jinks. “Coffee, obviously, has done well in recent years. Tea has done well, but driven more by the move to infusions and health and



The industry is looking to bring more value to tea through products such as Kombucha

‘fix it’ space, where its superblends have more of a functional benefit, such as calming, detoxing or chamomile to help you sleep.

She says the US is ahead of the UK on the knowledge around the functional benefits of tea, although it is growing in the UK.

As with many grocery markets keeping on top of flavour trends is crucial, although Coleman-Jinks admits Twinings is not an early adopter.

“You see stuff that’s bubbling along at the bottom, then it starts to get more noise around it, and then it becomes mainstream. You can decide when you go in. Sometimes we’re too late to the party.”

So, after deciding on the flavour, how long does it take to manufacture something? “It depends on the product sourcing,” says Coleman-Jinks.

“One of our big USPs is we have our master blenders on site. We don’t buy in other people’s tea and pack it; we buy raw ingredients and flavours and herbs, and create those blends here – which puts time into the processing.”

If the raw materials were available and speed was of the essence, Twinings could get a product out in three months, she adds.

Insight is central to identifying the flavours to introduce and testing the product along its development.

Coleman-Jinks explains: “At each stage in our framework, we have a

recommended set of testing methodologies. They can be around the concept itself, where you’re talking to people about understanding how it will fit into their lives – is it interesting to them? Right down to specific testing around the product – how big should the teabag be, what shape, what material? All of those things are tested.”

While Brand Potential worked with Twinings on its innovation framework, most of its innovation testing is done by Nielsen and it works with Millward Brown on brand tracking.

“You see stuff bubbling along, then it gets more noise around it, and then it becomes mainstream. You can decide when you go in”

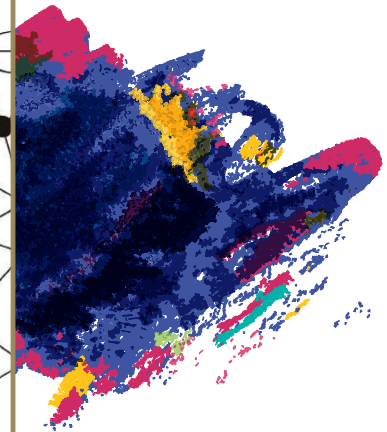
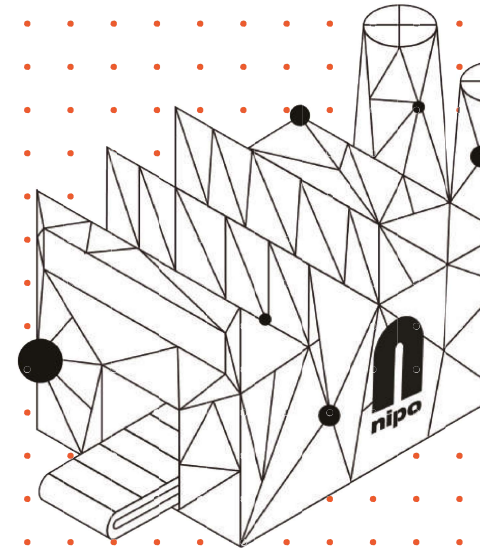


Introducing Cold Infuse has not only taken Twinings out of the hot-beverages category in the UK, it has also made the company reassess its segmentations and recognise that consumers don’t necessarily think of hot and cold beverages as separately as the company does.

It has an online community in the UK and has used techniques such as neuroscience-based testing and eye-tracking. “With the old consumer groups sitting around tables – or even in people’s homes – you’re only ever getting what they want to tell you,” says Coleman-Jinks, who believes research and insight needs to answer the big, general questions.

“How can we fit into their lives better? What is it they need? Then it’s about trying to see how you can create solutions,” she says.

“It’s getting to the big, attitudinal stuff. People don’t talk about it. It’s hard, isn’t it?”



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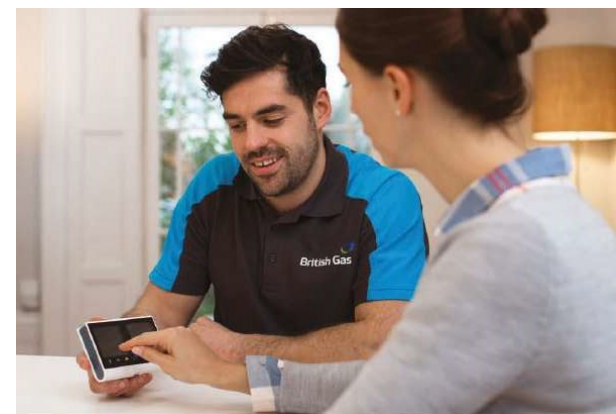
Energising the market

To address the changing nature of the energy market, British Gas had to adopt a more unified view of its data and insight, as Paul de Laat explains to Jane Simms

Paul de Laat joined Centrica, the international energy and services company, in 2016, as head of data, insight and customer value management. Competition was fierce: a rush of new entrants into the market wanted to break the dominance of the ‘big six’ energy suppliers, including Centrica’s main brand, British Gas.

Roll forward a few years and there are now 65 energy companies in the UK. While British Gas is still the biggest, growing competition – combined with General Data Protection Regulation (GDPR) legislation and a price cap on standard variable tariffs – mean the company has had to change strategic direction to differentiate itself in the market. As a result, its focus has switched from customer acquisition to customer retention, and gaining greater value from more loyal customers.

De Laat and his team are playing a pivotal role in this strategic shift. “I joined Centrica at a time when all profit and loss accounts (P&Ls) operated as product silos – energy supply, boiler installation and servicing, insurance, and so on,” he explains. “We decided to move these product and service areas into a single P&L to remove duplication – including of data and insight. My role was to bring all the data together from across the business to create a single view of the facts, and a single view of the customer across all products and channels.”



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“The company has extensive information, not just on existing customers, but also on the homes where previous customers have lived”
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As De Laat points out, the company has extensive information, not just on existing customers, but also on the homes where previous customers lived. Pulling information together from multiple sources means British Gas can give the kind of personalised and highly relevant offers and interactions with customers that have been the stock-in-

trade of companies such as Amazon and Spotify for years.

“Utilities were a bit behind,” says De Laat, who has worked in similar roles for John Lewis and Waitrose, Lloyds Bank, Vodafone, Orange, O2 and Thomas Cook. “My passion is bringing together the data in an organisation and looking for opportunities by creating

insight that can feed into sales, product development and operations. Over the past couple of years, there has been a big effort to build a team with the capability to allow us to do that.”

He describes the team as being “part of the ecosystem – at the centre, feeding the rest of the organisation with data, management information and insight”. The data strategy and operations part of the team pulls together data from multiple sources to understand, at a household level, what products and services are being used. This includes names and addresses captured through products and services, and rough information on the state of equipment in the house, based on installation dates and service engineers’ reports. This is combined with socio-economic profile data, based on where people live.

Three-point approach

Combining this allows the team to do three things. One is to give British Gas management information, such as metrics on the number of people who visit the website and then call the contact centre.

The second is deep-dive analytics – understanding why customers buy the products that they do, profiling groups of similar customers, and looking at the differences between groups, to create more meaningful interactions with them.

The third thing is developing propositions and products that will better appeal to different groups of customers. “What are the unmet needs of our customer base? Which products aren’t doing the right job, and what could we change – could we bundle products together to help customers understand their value better?” says De Laat. Critically, it’s working out which customers would be receptive to ‘intelligent home’ products, such as smart meters, smart thermostats, smart appliances, lights and so on, marketed under the British Gas sub-brand, Hive.

These smart products can be accessed via a mobile phone app, which allows customers to do a range of things

remotely, from delaying turning on the heating because they’re going to be late home and checking if they really did switch off the iron before leaving for work, to being alerted that an ageing relative is up in the morning because they have switched on their kettle.

“A big piece of our analytics work is determining for which customers these sorts of products are relevant, and then translating that into practical cases so they can see the value,” says De Laat.

Of course, people who use these products enrich the customer picture still further, creating a virtuous circle that allows the customer value management and operations part of the team to create micro-segments of people likely to want a certain package, and to communicate with them accordingly. “There might be only a few thousand customers every month in a particular micro-segment, but we can manage thousands of micro-segments at once,” says De Laat.



“Churn among the two million or so British Gas Rewards programme members is half that of those outside the programme”



The team used the same tools to create its Rewards loyalty programme. “I spent nine years working in mobile, and at O2 in 2005 the deep customer insight was that existing customers felt newcomers got a better deal. O2 was one of the first to realise this had to stop. Utilities were behind the curve there. For the past 18 months at British Gas, all our deals are available to all of our customers.”

The objective of the Rewards programme – which, among other things, gives customers two free days of energy for every year they stay with British Gas – is to stem the flow of customers to competitors. “We may not be the cheapest, but we want to ensure we offer value for money,” says De Laat, who points to the number of smaller

competitors that have built customer bases with aggressive energy pricing to make themselves attractive to predators. An example is First Utility, which was bought by Shell – but others have gone bust. “Operators such as British Gas are obliged to be the ‘provider of last resort’, which means there is low risk for consumers and the smaller suppliers if things go wrong.”

The work is having an effect: “We have halved the outflow over the past two years, but there is still more work to do,” says De Laat, adding that sheer numbers are less important than the value inherent in retained customers.

Churn among the two million or so (and growing) Rewards programme members is half that of those outside the programme, and about 20% more

Rewards members have given permission to use their data than non-Rewards members, “because they see the value exchange”.

Utilities may have been behind the curve in the way they harness and use data, but British Gas is racing to catch up. Mike Follett, managing director of Lumen Research, which uses eye-tracking research technologies to understand what captures consumer attention and drives their behaviour, describes the company as “a real innovator”.

Lumen started working with Patrick Smith, digital marketing manager at British Gas, nearly three years ago, to help increase the effectiveness of the company’s digital advertising and, in the process, nail some industry myths

about what builds sales. At issue was the 'viewability' of digital ads. Follett points out that many ads purport to be viewable, but appear either at the bottom of the page – so you never reach them – or at the top of the page once you've scrolled down. Other ads appear on the page in front of you, but don't meet the minimum 'viewability' criterion of having at least 50% of the pixels showing for at least one second.

Identifying digital ad value

Lumen focuses on a third category of ads – those that have at least 50% of pixels, and are clearly visible for more than one second. But, even here, there are big differences in attention-grabbing power. Not only are big, bold, beautiful or funny ads better at capturing attention (predictably), but, somewhat less predictably, the site of the ad is a major determinant of the extent to which people engage with it.

"Ads on the sites of major newspapers are much more likely to be seen than the same ads on sites such as eBay or Zoopla," says Follett – and the most likely explanation is that people on these sites are much more engaged with the content. Mapping British Gas's historic sales data onto the attention data showed that ads on 'good' sites converted into higher sales, too.

Over the past year, British Gas has continued working with Lumen and its media-buying agency Mediacom, to run a series of test and control experiments. These compared ads targeted to, for example, *The Times* in a discrete geographical area, with the more general approach it has traditionally taken in the rest of the country. The results are convincing: investing in better-quality ads in 'better' media may be 50% more expensive than a normal run of the market, but sales are 239% higher.

Follett says British Gas challenges his firm with more and more interesting questions, which forces Lumen to come up with appropriate answers. One finding was that, while ads at the bottom of a page typically have low viewability, on 'good' sites, people are



"Investing in better-quality ads in 'better' media may be 50% more expensive than a normal run of the market, but sales are 239% higher"

much more likely to see them. As Smith explains, "people are really concentrating on what they are reading, so will not only get to the bottom, but also scan around a bit more". So, you can pay a lower cost per thousand impressions, but earn disproportionately high attention and sales.

The challenge now is to translate this ad hoc manual testing, which is time-consuming, into British Gas's programmatic media buying. "We are working with Lumen on a new demand-side platform, Avocet [which uses machine learning in planning analysis] and are doing a deep dive into whether we can replicate the attention we got using the manual approach, programmatically, at scale," says Smith.

GDPR and data transparency

While GDPR is the bane of some organisations' lives, its effect has been overwhelmingly positive at Centrica, says De Laat. "We make it very clear to our customers, across all touchpoints, that they are in control of their data, that we will not sell it to third parties for

marketing purposes, and that we will use it only to deliver more relevant products and services to them. We make it very simple to opt out – and because we are so explicit and transparent about this, our relationships with customers have improved."

What's more, GDPR has forced the business to think about what customer data it really needs and what it wants it for, De Laat adds. "We use data better and more consciously now. Data storage is very cheap, but hanging onto it increases your liability – so not only do we have a more open dialogue with our customers about how we use their data, but we are also cleaning up our data constantly."

He won't reveal what percentage of customers have opted out, but says it is lower than in some industries, where opting out denies people access to services and functionality. Apple, Uber and WhatsApp are examples of firms for which opting in is integral to the product/service offering. "If you opt out of marketing with us, we don't switch off your energy," De Laat says.



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League loyalties



Rugby League may not have the reach of Union, but its customer and insight director, Alison O'Brien, tells Rob Gray how she's ensuring the sport grows its viewing figures and participation rates

One of the great schisms in the history of sport took place at a Huddersfield hotel in 1895, when the leading rugby clubs from Yorkshire and Lancashire decided to split from the Rugby Football Union in a dispute over payments to players and governance issues. This rift led to the evolution of two rugby codes and, eventually, triggered the formation of the Rugby Football League (RFL) to administer the 13-a-side version of the game.

Today in the UK, the game's heartland remains the north of England, and a rich heritage bound up with a strong regional identity is, without question, a compelling aspect of its appeal. At the same time, this is a modern and global sport that's powering forward on a mission to attract even greater support.

The Rugby League World Cup will take place in England during October and November 2021 – and, for the first time, the men's, women's and wheelchair competitions will form part of the same huge event, with matches staged at 14 stadia.

Clearly, an event of this scale and prestige offers enormous opportunities for the RFL to meet its objectives of attracting more players, spectators and viewers. Harnessing insight will be key to success in this regard – yet, despite being professional for more than a century, the sport is only a comparatively recent convert to the wholehearted embrace of insight.

When director of customer and insight Alison O'Brien joined the RFL in 2015, after a career in FMCG and retail with Morrisons, Arla Foods, Princes Foods and

“Sport, generally, has not really embraced the data and insight world in the way other sectors have”

Reebok, there was no insight function in place. The national governing body (NGB) didn't have a clue how many people were interested in the game, played it or attended matches.

Over coffee in a meeting room adorned with retro rugby posters, at the RFL's Grade II-listed headquarters in one of the leafier parts of Leeds, O'Brien explains that her four-strong team – herself, two data analysts and a market research executive – report to the chief commercial officer, rather than being integrated into a marketing department,

as has been the case at some of her previous employers.

She's happy to be “where the servicing functions sit within the organisation – that central, neutral place”, defining her role as giving a service for the good of the sport as a whole, rather than solely helping the RFL to meet its commercial aims.

The truth of this is undeniable given that the RFL serves a broad array of stakeholders. On taking up her role four years ago, however, O'Brien's priority was to launch a segmentation study to

understand the RFL's audience better (see box p55) and create a single customer view linked to a customer relationship management (CRM) system.

“A lot of other NGBs still don't have the type of function we've put in place,” says O'Brien. “And sport, generally, has not really embraced the data and insight world in the way other sectors have. Probably for the past five years, a lot of NGBs have known they need to have it – ‘data’ and ‘customer’ are common buzzwords – but have not quite known what they need.”

“That was the appeal for me of coming here: the fact that there was nothing – a blank canvas – but also seeing the untapped potential of a really rich data asset that the NGB is sitting on.”

O'Brien has a seat on the executive board and makes the point that senior

buy-in is critical. Data, insight and the customer voice are paramount in informing strategic decision-making that will affect the sport, she argues.

The diverse stakeholder base extends from kids aged six and upwards playing in community clubs, through schools' rugby to Championship and League One teams and organising the illustrious Challenge Cup competition. While the Super League – the equivalent of football's Premier League – the England Performance Unit to help develop more world-class England players, and the Rugby League World Cup are ostensibly separate organisations, they all benefit from access to RFL insight. As it happens, the World Cup team is currently based at the RFL's second office at Media City in Manchester, although the plan is for it to relocate once it scales up.

As an NGB, RFL is funded by Sport England to some extent and is obliged to report back on a monthly basis with participation figures. This reporting must include insights into the types of people involving themselves in rugby league and why they are important to the overall social outcomes that Sport England is trying to achieve.

To advance further evidence of the significant contribution professional and grassroots rugby league delivers to the community, O'Brien's team is working with Manchester Metropolitan University on a project called the Rugby League Dividend. The intention is that the findings, due later this year, will highlight the positive difference the sport makes to individuals, especially those in deprived communities where other opportunities are in short supply.

"When it comes to funding, it's not just about how many people you can get playing, but what type of people you can encourage, and how you might help and support them," says O'Brien. "This project is also looking at what, if anything, there is to support them if rugby league didn't exist for those people in those communities. The reality is probably not a lot.



“Funding is not just about how many people you can encourage, but what type of people, and how you might help and support them”

"That makes participation in rugby league really important and valuable. That economic and social piece is a really good use of research time, to help the sport in terms of securing future funding, but also to really understand your audience, what you can deliver for them, and how you can help them."

Another major ongoing project is defining a pricing strategy for World Cup tickets, which RFL insight is working on with sports data and marketing specialist Two Circles. Clearly, filling stadia will be a key benchmark for judging the success of the tournament.

The aim of this 'MaxDiff work' is to get

to grips with the trade-offs fans are prepared to make when paying for different categories of seats, to see certain kinds of team and so on. O'Brien describes it as "quite a big quantitative piece of work" that takes in some historic studies, as well as workshops and hypotheses designed to help build the questionnaire.

Rugby league's strong association with the north presents opportunities, as well as potential limitations. In 2017, for example, the RFL seized the chance to strike a deal to become the official sport of the Northern Powerhouse and, in the process, unlocked some World Cup bid

Understanding the audience

RFL asked Nielsen Sports to deliver a segmentation study based on qualitative and quantitative work. Focus groups were conducted to gain in-depth understanding of the rugby league 'consumer', together with a 20-minute online survey with 2,000 respondents who expressed some interest in rugby league – from slightly to very interested.

Key findings:

- 14.4m people in the UK are interested in rugby league
- The sport has a nationwide fan base

- Not all rugby league customers (fans) are the same
- Six customer segments – different levels of interest, engagement, behaviours, attitudes and demographics (see infographic below)
- Insight into lifetime value of customers.

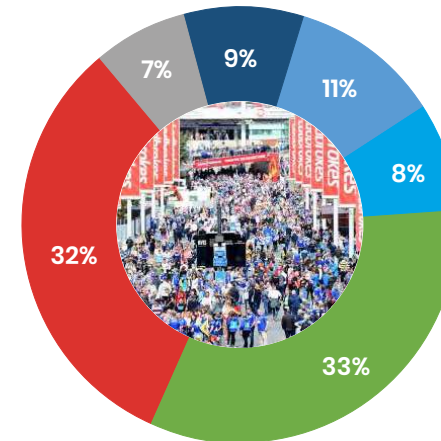
"We got an almost too-perfect six-segment segmentation," says O'Brien. "I say 'too perfect' because that's the ideal number. We had to go back and check it a few times."

Having satisfied herself the segmentation was reliable, O'Brien has

used it to: prioritise target customer segments; ensure the customer is at the heart of decision-making; generate targeted marketing communications; and frame and influence strategic decision-making/planning.

One noteworthy segment predominantly comprises women who have come to the sport through a partner or their children, and who are involved "because it's a way of spending time with their family". These women are the household decision-makers and, therefore, highly valued by sponsors.

UK rugby league audience 14.4 million



SEGMENT 1
Market size
1.33m

SEGMENT 3
Market size
1.17m

SEGMENT 5
Market size
4.55m

● All market sizes are estimates

SEGMENT 2
Market size
1.63m

SEGMENT 4
Market size
4.71m

SEGMENT 6
Market size
0.96m

SEGMENT 1: Hardcore rugby league fans

- Most interest in rugby league
- Born into rugby league communities
- Live and breathe the rugby league

SEGMENT 2: Sports-mad males

- High levels of interest in rugby league
- Generally interested in most sports
- TV was their introduction to rugby league

SEGMENT 3: Women whose interest in rugby league originated with their partners

- Mid-level interest in rugby league
- Rugby league is about a shared experience and connecting with people

SEGMENT 4: Big eventers

- Some interest in rugby league – it's one of many sports they follow
- Have busy lives
- See big sporting events as a social opportunity

SEGMENT 5: Armchair sports fans

- Low levels of interest in rugby league
- Exposure to rugby league is limited to TV

SEGMENT 6: Lowest levels of interest in rugby league

- Lowest levels of interest in sport in general
- Limited knowledge of rugby league
- Some will watch the biggest games on TV

funding. In return, at least 80% of World Cup matches will be played in the north. This will not only generate revenue for the host cities, but should also benefit the region with a positive post-tournament legacy.

But what of the drawbacks that might arise from the link with the north? Are non-northern brands reluctant to get involved?

“People based in the north probably know the sport better, and can see the opportunities,” concedes O’Brien. “But the fact is – if you look at some of the major partners that we have, such as Coral and Betfred – sponsorship opportunities come from the demonstration of insight; that we know our customer and can show that our customer fits your customer.”

The growing geographical spread of the game – with successful teams in London and Toronto, for example – helps the case, as does national TV coverage on the BBC and Sky. The deal with Sky comes to an end in 2021, and O’Brien and her team will be heavily involved in making the commercial case for the sport as the RFL strives to secure a favourable new agreement.

“Broadcast is key,” she says. “Clearly, from a research and insight point of view, there is a lot of work to do to get ready for those rights negotiations.”

Although the insight budget is growing, resources are more limited than the ones O’Brien had at her disposal when working in retail and consumer products. Spending is prioritised based on strategic objectives and the team runs a lot of research in-house, managing around 20 quantitative surveys and 20-30 focus groups a year. There are annual fan and player surveys and ‘listening groups’, which entail visits to community clubs to talk to people who play the game at grassroots level. The RFL also tracks changes to its audience segments through a syndicated Nielsen Sports survey.

As a governing body, the RFL has



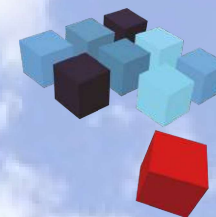
“People based in the north probably know the sport better, but sponsorship opportunities come from the demonstration of insight”

access to a large amount of customer data, spanning membership (which is free), participation, and ticketing sales for central events such as the Challenge Cup. Together with sports-fan engagement specialist InCrowd, which manages the data centrally, the insight team has developed a database with a strong focus on the single, identified customer and linked it to a CRM system, to allow targeted and engaging customer communications. Alongside the segmentation study, it is O’Brien’s proudest achievement since arriving at the RFL.

Information gleaned from the database underpins another important project: the RFL’s ambition to get 21,000 women and girls playing rugby league

by 2021 – a target figure symbolically tied into the 2021 World Cup. Physical and learning disability rugby league participation is also high on the agenda. “Accessibility for everyone, and flexibility of playing offers – a lot of research goes into understanding how we can open up the sport to everybody,” says O’Brien.

Although she grew up in the north, O’Brien was not a rugby league fan when she joined the RFL. That has changed, helped by some amazing experiences, such as attending the 2017 World Cup in Australia and walking the “presentation party” for the Four Nations international tournament down the Anfield tunnel and onto the pitch. In the parlance of the game, O’Brien has picked up the ball and is running with it.



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The business of data

With increased focus on the ethics around how companies are collecting and using personal data, some members of the Market Research Society's Delphi Group took part in a roundtable discussion on what business needs to do. Jane Bainbridge reports

Jane Frost, CEO, MRS: It is timely to have this discussion because there has been more interest in regulating social media sites and more pressure on them to do more internal self-management. Is there a paradigm that is professionalised management with a very strong code of ethics? Would that be a better way of improving on these continuous crises of ethics and management hitting social media?

Nick Baker, UK CEO, Savanta: Is the dilemma that they aren't geographically tied and a lot of regulation – where it works best – is in a national context?

JF: I cannot see anti-trust coming in against social media companies. I think it's too big, and the other problem is that big data relies on it being global and at scale.

Jake Steadman, senior director, Twitter: It's a global debate, but brand trust can still be eroded at an individual market level.

Tim Britton, managing director, open research group, Springer Nature: I don't understand the distinction between ethics regulations and ethical breaches under a set of regulatory rules – one merges into the other. Needing training within ethics strikes me as a bit odd – you try to do the right thing. If you know what the principles are, you try to follow them; if you work within a regulatory environment, you must work within the rules. Is the question: 'How is this to be governed?' Or is it: 'Is there good or bad in it, should it be allowed?'

NB: This is an issue for any multinational dealing with data on a massive scale. This is about market

research or social research using data well.

JS: This debate gets framed by the media on a few large companies. Demos' Carl Miller has an interesting point on this. The debate is broader than it gets filtered through in the media where they need a household name to target.

NB: A code of ethics will have to sit alongside a regulatory framework. Those things are going to exist in different places, but the ethical bit potentially becomes one of the core mechanisms for rebuilding trust. If you can demonstrate that, then you'll get more permission to do stuff with data.

JS: I agree, it's transparency, and following through and doing what you say you're going to do.

TB: It's an interesting point around being demonstrably and believably ethical, because I suspect the reaction from many consumers would just be: 'Yes, they say that, but they do whatever they want with our data'. So, if there was a simple ethical framework that people believed – that could be helpful.

JF: Is it government regulation such as GDPR? Do you need to put something into corporate governance codes like Sarbanes-Oxley where it's the

duty of the board to ensure there is appropriate management in place?

JS: Twitter's been clear that we think there is a different route, a more realistic self-regulation, radical transparency route.

TB: Regulation is going to happen. How effective it can be remains to be seen. It's far from a perfect implement – it doesn't do the whole job – but that doesn't mean it isn't necessary. We must be careful when industries say, self-regulation is better – it is interpreted as: 'You don't want to be properly regulated'. We should have a clear approach to an ethical use of data, which may involve statements in broad practices, or maybe it becomes part of annual reports.

More companies are putting their data assets on balance sheets. The management and value of data is becoming more reported.

JS: There's an important distinction; we're talking about data regulation not wider social media. In that context, I wonder whether people have enough knowledge to know what's good or not.

TB: That's fair, it comes back to the distinction between regulation and ethical principles – I think regulation can potentially deal with those points.

JS: I can see a traffic light system [working] but who does that have to get applied to? Every company owns data, so at what point does a company have to report that? Is it fair to judge large multinationals by the same standard as a two-person start-up?

TB: Companies choose to sign up to it, so if you are a two-person start-up that wants to do everything properly, you sign up to the principles. If you don't, suppliers can decide whether they're willing to do business with you or not.

JF: A lot of this was the principle under which we established FairData – it ought to be something that consumers can recognise easily, and it should be a general stamp of approval about how you're managing personal data.

JS: I'd imagine there is a nervousness about what

the organisation can control versus what it will be given responsibility for from a data analysis point of view. A lot of times the analysis is done by third parties, not the company that created the data.

JF: A small number of very large companies are becoming, by the force of the data and the scale of what they do, super-national entities, probably more powerful than any individual nation state. That's geodemographic development.

TB: If we're not all willing to stand up and say, 'this is important, we need to do something', then whose job is it? It's easy to throw our hands up in the air and say it's all a bit too hard. I think we must be clear that we're welcoming regulation, that there are ethical principles to which we work.

JF: As a sector, we live or die by the trust that people have in giving us resonant information. We ought to be slightly proud that previous generations of the MRS had tougher ethical standards for using data in research – like our children's guidelines – than advertising had. They only caught up to us 11 years after we'd started laying down the law about when you could regard a child as an adult.

TB: It's assumed that individuals give data away, corporations benefit financially and there's nothing in it for the individual. That just isn't true. Organisations are finding out what services make life better for the group of consumers involved, or society. I'm not saying bad is never done, but good is often done.

I get really nervous of saying you have to specify exactly how you're going to use the data because, actually, it's the data I collected three years ago that I suddenly realised – if I put it with the data I've got now – I can do this amazing new thing for this group of people, that I had no idea was going to happen at the time.

JF: So, I think we're saying that there's a lot to be learned from research because of what we've been doing; it has bolstered our business rather than detracted from it. We, as people with skin in the game of trust and transparency in data, feel that we do have a role in recognising where other people are doing it well in the wider world.

“Twitter thinks there is a more realistic self-regulation route”

“Brand trust can still be eroded at an individual market level”

“I'm not saying bad is never done, but good is often done”

In 1783, the Bank of England appointed a committee to interview employees about the nature of their work, with the aim of understanding more about working practices and identifying failings.

One of the most interesting findings was the extent to which the clerks' working lives were determined by the clock – with a time appointed for their arrival and departure, and attendance books ensuring their compliance.

Since the Industrial Revolution, businesses have used methods – such as clocking-in machines – to monitor their employees' efficiency and punctuality. Today, however, companies can monitor staff in far greater depth, using technology and automation to track everything from how often a worker takes a toilet break, to what websites they visit and who they are emailing. Workplace surveillance has moved beyond timesheets and become more sophisticated, giving employers valuable insights on staff performance, loyalty and wellbeing.

For example, IBM chief executive Ginni Rometty recently said the company can use artificial intelligence (AI) to predict, with 95% accuracy, which employees are planning to quit their jobs. Meanwhile, Isaak – an artificial intelligence system developed by Status Today – can analyse email data to allow companies to detect whether an employee is overworked, compare wellbeing by team, and assess whether workers are collaborating effectively.

At the more extreme end of the scale, Amazon has patented a wristband to track warehouse workers' movements, and Swedish start-up Epicenter offers its workers the chance to have a microchip implanted into their hand, allowing them to open doors and operate printers without key cards or employee badges. Although the Epicenter chips don't allow for monitoring, it's an interesting – if somewhat dystopian – glimpse into how 'bio-hacking' could be applied in future workplaces. Biohax, the company that supplies the chips, is said to be in talks with UK legal and financial firms to implant their staff.

Since the financial crisis, the UK's labour productivity growth has been lower than at any time in the 20th century, and one of the main reasons is below-average management practices, according to the CBI. Could workplace monitoring play a role in improving people management?

Research by Britain Thinks for the Trades Union Congress (TUC) found that the most common forms of surveillance are: monitoring employees' work emails, files and browsing histories; CCTV; and logging and recording phone calls. According to the

I'm all eyes

Technology is making it possible for firms to gather more information on their employees' performance and movements. But how is this data being used, and is there a risk that workplace surveillance could leave staff feeling spied upon?

By Katie McQuater

study, the clearest potential benefit of being monitored, from a worker's perspective, is that it can offer a more objective record – in theory, those who work harder should be able to show clear evidence of this to circumvent potentially biased opinions of a manager. On the other hand, this could be outweighed by employees feeling undermined.

Max Templer, research lead at Britain Thinks, says: "Introducing these kinds of monitoring technologies is often taken as a signal that employers don't trust their employees to do their job without someone – or some software – peering over their shoulder. This leads to the question of whether monitoring employees to this extent is worth it, compared to the risk of harming staff morale."

Matthew Chatterton, research director at



Workplace monitoring technologies are part of a broader increase in using automation to inform, and even outsource, decision-making across various parts of society. Placing too much faith in data, however – in the context of work – could result in human values such as creativity being eroded. Chatterton says: "There is an assumption that we can break down human behaviour in a mechanical way. That seems to lose something fundamental about the value of having people. It is especially challenging in customer service scenarios, as customers place a lot of value on interacting with humans rather than machine agents."

There's also the elephant in the room – privacy. While the more advanced means of tracking workers – such as facial coding and wearables – are far from widespread, 79% of workers surveyed for the Britain Thinks research thought employers should be legally required to consult and agree with workers on new forms of monitoring. Introducing more sophisticated methods raises the question of how much surveillance is acceptable, and who sets the parameters. In the delicate power balance of the employer-employee relationship, can workers truly consent to being monitored if they feel they have no other choice?

Smarter use of space

Monitoring is being used not only to understand more about people in the workplace, but also more about the space itself. Space use has been considered by companies such as EY, while co-working company WeWork uses data insights to help its clients optimise how they use their spaces. Approaches include data from thermal detection or motion sensors, analysing meeting room bookings, and employee surveys – but WeWork says it doesn't monitor people and uses insights at an aggregate level.

Gathering workplace data could bolster an organisation's insights in addition to findings from traditional employee research programmes. "Real behavioural data could clarify the reality of what employees are doing in specific situations, helping dispel myths and received wisdom," says Ipsos Mori's Chatterton.

However, monitoring workers alone is limited in how far it can go and doesn't identify the drivers of behaviour, says Andrew Greenberg, chief executive at Greenberg Strategy. Companies that fail to take a longer view also risk losing sight of their overall cultural wellbeing, he adds. "The major drawback is not understanding the root of the problem. People are complex beings, and there is no 'one size fits all' way of approaching issues with a workforce."

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Seven deadly sins



According to Christian tradition, the seven deadly sins, or cardinal sins, are envy, gluttony, greed, lust, pride, sloth and anger – and there is an app that caters for each Biblical vice.

Each of these apps is a micro-reflection of the fourth industrial revolution and the greatest transfer of value in stock market history. Trillions of dollars have migrated from traditional industries and companies to the tech titans that own these apps. Some of these giants – such as Apple, Amazon and Microsoft (owner of LinkedIn) – have individually become the first trillion-dollar-quoted companies in history.

1 Envy. Facebook, with more than 2bn subscribers worldwide – nearly 30% of the global population – is the prime site for inciting envy and jealousy. Photos and information posted encourage voyeurism and stoke feelings of discontent and resentful longing of someone else's possessions, experiences or luck. Deep down, envy is caused by a dissatisfaction with one's self-image. This dissatisfaction reflects low self-esteem – a poor self-appraisal, with feelings of inferiority and shame – which is reinforced by engaging with Facebook.

2 Gluttony. Just Eat, Deliveroo and Uber Eats all cater to humans' habitual greed and propensity to eat and indulge to excess. Food we love, delivered to our door, desk or dining table in as little as 15 minutes – with no calories expended in preparing it and many consumed in eating it. Call it binge eating or overconsumption, gluttony is widely seen as an emotional cry for help. As author Peter De Vries says: "Gluttony is an emotional escape, a sign something is eating us."

3 Greed. Amazon and LinkedIn cater for the human desire of more goods and more opportunities. Amazon Prime offers unlimited one-day delivery at low prices, while LinkedIn manages the professional identity of its 500m members, building their personal brand and professional network. Greed is defined as an intense and selfish desire for something, especially wealth, power or food.

4 Lust. Tinder is a location-based social search app used as a dating site, which claims 30bn matches to date. It is the world's most popular app for meeting new people, with user

information based on pictures, a short bio and an optional link to Instagram or Spotify. Lust is not just a strong sexual desire, but an overwhelming desire for a human being that transforms the human from a subject to an object that is solely meant to give one pleasure.

5 Pride. The photo and video-sharing social network Instagram encourages users to capture and share 'the world's moments'. Users add captions, edit filters and tweak settings, posting the photos and films they take pride in, which make their lives appear glamorous and exciting. Pride is a feeling of deep pleasure or satisfaction derived from one's own achievements, qualities or possessions that are widely admired.

6 Sloth. Netflix sells online streaming of movies and TV shows to your smart TV, game console, computer, mobile and tablet. It has nearly 150m paid subscribers – or couch potatoes – worldwide. Sloth is the reluctance to work or make an effort; it is laziness and idleness. What better way to encourage insolence, inactivity and inertia than to provide the whole of Hollywood on tap?

7 Anger. If it's happening anywhere, it's happening on Twitter. The latest news and world events, faster – from breaking news and entertainment to sport, politics and everyday interests. Unsurprisingly, a platform where all voices are heard and instant responses elicited, strong feelings of annoyance, displeasure or hostility follow. Anger is easily incited by an unfair or insulting comment that provokes pique and displeasure.

It remains to be seen what the long-term ramifications on society and human behaviour will be – but, in stock market terms, these companies and apps have had a profound impact already. Their high valuations, reflecting their high growth, have been driving all stock market performance, leaving legacy companies far behind.

The social media products of the tech players are reminiscent of the structured products of the banks that pushed the envelope to its very limits in the run-up to the global financial crisis. The banks did what was legally possible, but morally dubious. Is there a parallel here?

Paddling the data lake

Bethan Blakeley shares her guide for not being overwhelmed by your data, and instead analysing it with confidence and purpose

Most of us, by now, will have heard of the infamous 'data lake' – another annoying piece of jargon being thrown about by data scientists, data analysts, business intelligence analysts, data magicians, or whatever other crazy job titles you might have come across.

It seems like we're always talking in metaphors nowadays, and the data lake is no exception. If you're dealing with anything vaguely resembling data, you'll struggle to avoid it. Personally, I don't like it.

First, it's completely unhelpful for those who don't work with data or haven't come across it before – if you're one of those people, it essentially means 'a heck of a lot of data' (enough to fill a lake, I guess). Second, I think it conveys a desperate image of a huge expanse of water, unable to see land, being stuck, lost and forlorn in a never-ending sea of doubts. This isn't the ideal picture we want to create of our industry, the people working in it, or the problems we're solving.

The more time passes, the more complicated our industry becomes to the innocent bystander. Suddenly, what was just plain old boring statistics becomes a new, shiny, 'trendy' field of data science. We start throwing words around that essentially don't mean a lot – machine learning and artificial intelligence being two of the biggest offenders.

Don't get me wrong, there are many people who are incredibly skilled in these areas. I'm not saying they don't exist, or are pointless, or should be ignored. We should all be working hard to avoid this type of jargon to be less intimidating, and easier to understand for Average Joe (or Josephine).

With that in mind, I have some tips that might help, no matter what your level of understanding. I may not be able to teach you how to 'navigate the ever expanding and terrifying death trap of the data lake', but everyone loves a bit of doggy paddle while they're learning to swim, right?

●
"The more time passes, the more complicated our industry becomes to the innocent bystander"
 ●

1. Paddle with a purpose

Don't set off on your analysis quest without an objective in mind. If you're not looking for something in particular, the likelihood is you won't find anything. Make sure you have some questions at the forefront of what you're doing and keep bringing yourself back to these questions.

2. Clean up your act

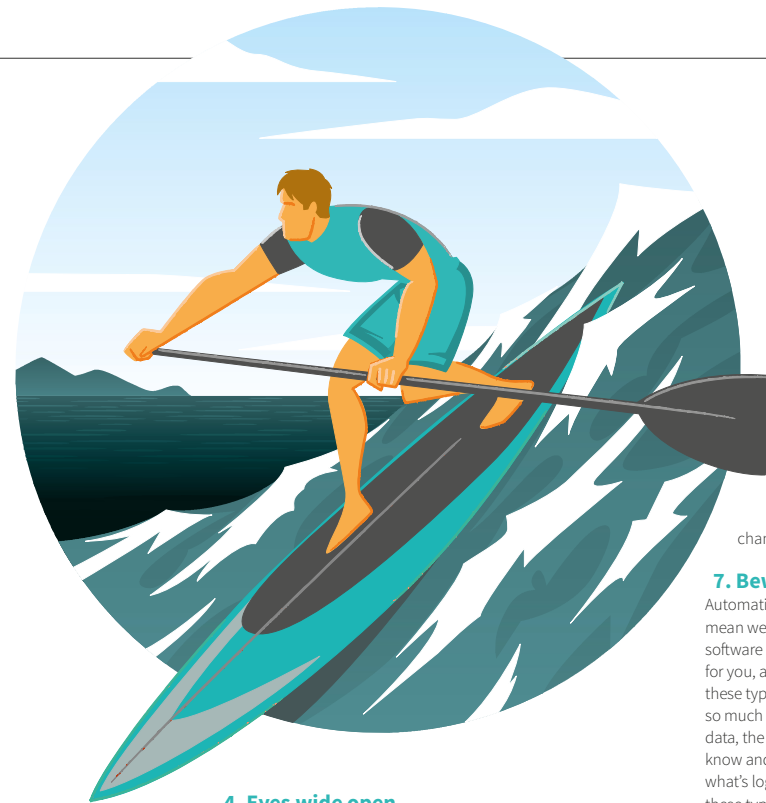
No matter what sort of data you're working with, how long it's been around, or where you got it from, it could probably do with a good clean. The cleaning process is likely to change according to your different questions. Is your currency pounds, dollars, euros or something else? Do you need to convert these? How many Not Applicables (NA) do you have? Is it a valid response? In some cases, you may want to replace an NA with a zero. In others, that would skew your results and change your data.

3. Bitesized chunks

If you start by opening your dataset of however many million records, you might feel a bit overwhelmed. Start with something smaller and more manageable. There are several ways you can split up your data: by sampling or by objective.

By sampling – sometimes, it's as simple as giving yourself a fraction of the original data to begin with. Make sure your data is randomly sorted and take a smaller selection of it. Use this to test your hypotheses and answer your original questions, and then go back to the bigger dataset to ensure these answers are the same when looking at everything in one go.

By objective – I'm a big believer in only taking what you need. You may not need all your data points to answer some of your questions. If you decide that your customer's brother's dog's favourite day of the week isn't relevant, it probably isn't. Get rid of it. Focus on what you need to begin with, and you can always add in more data at a later stage.



important to question all your findings, all the time. Does it make sense? Is it what I expected? Does it answer my original questions? Is it telling me something I can use? Is it useful for the business? Could I explain it to someone else? Would they believe me? Sometimes, talking someone through the insight can be beneficial – if you're met with blank stares or confused faces, the chances are you may have missed something.

7. Beware the black box

Automation is everywhere now, but that doesn't mean we should use it everywhere. It's easy to find software and algorithms that can 'analyse your data for you, at the click of a button'. Please approach these types of applications with caution. You know so much that they don't. You know more about the data, the context, the analysis process so far. You know and understand your questions. You know what's logical in the real world and what isn't. Use these types of solutions to aid your analysis – but don't blindly rely on it to do everything, no matter what the cheesy sales pitch says.

8. Document everything

It may seem like a pain when you begin, but I can guarantee that after you've accidentally misplaced your file, deleted your code, or killed off your laptop, you will be glad you did. Keep a note of all your steps, even if they seem small and insignificant. We're not talking a publishable novel here; these notes are for your eyes only. Just jot everything down as you're going – your variable transformations, how you decided to clean your currency, what you did with those NAs. It means if mistakes are made, it's easy enough to go back to where you were.

And there you have it – an eight-step guide to paddling your way through the data lake; no need for an oar, or a snazzy automated-machine-learning-data-wizardry-speedboat-with-added-AI. Just you, your knowledge, your expertise, confidence, and some curiosity.

● Bethan Blakeley is a director at Honeycomb

4. Eyes wide open

You may have heard of EDA (or exploratory data analysis). This is always one of the most useful parts of the process for me. Get to know what's going on in your dataset. Explore it, summarise it and visualise it. Get to know the context of your variables. What are your currency variables; is £10 normal, or is £100,000 closer to the average? What does this mean for you, for the data, for the questions you're asking?

5. Mind the gap

You'll often find yourself thinking 'I wish I knew...' There is a huge amount of data out there, in the public domain, for anyone to use. Have a look and consider whether any of this additional data could add another dimension. Looking at clothes sales? How much does weather have an impact on this? If you're analysing customer engagement, would it help to know the demographics of the customers' local area?

6. Question time

They say common sense is not so common, and in the context of data analysis, they may be right. It's



The dawn of a new G

With 5G rapidly approaching, Jennie Roper looks at how market research can help ensure brands embrace this and other associated technology

In 2006, you could smoke in a restaurant in England and BlackBerry dominated the smartphone market. How times have changed.

Think back to how you got somewhere you hadn't been before – I was a big fan of the printed-out Google map. Then, in 2007, the iPhone launched and triggered a societal shift. Yet consumers didn't immediately default to the new technology that shapes our lives today.

In my opinion, 5G – and the impact it can have on augmented reality (AR) and virtual reality (VR) – represents a new societal trigger. There is huge potential for AR and VR to be used as an extension of brand experience.

According to a recent Gartner study, 100m consumers will shop via AR and VR – whether

in-store or online – by 2020. At Kinetic, we have collaborated with Marks & Spencer to produce pop-up VR showrooms where consumers can create their ideal living space. Chinese e-commerce company Alibaba has also launched a complete VR shopping experience. 5G mobile network technology represents an opportunity to accelerate the adoption of VR and AR.

There is huge scope for researchers to demonstrate value to a business by identifying not only when their target audience will adopt a new technology, but also understand which technological features will benefit customers most, resulting in changing consumer behaviour.

There are three rules to adhere to when advising brands how and when to embrace new technology.

Timing

Brands have the potential to do some great mixed-reality communications – but just because we can, doesn't mean we should. It's important to think about who will use such communication; do consumers have the technology to do this?

A key reason AR and VR have not been widely adopted is because they need to access and manage huge amounts of data. With ultra-high speed, ultra-low latency and high bandwidth, 5G can support real-time rendering for immersive video, and shorter download and set-up times.

Vodafone will launch 5G in the UK in July, bringing with it the potential for more VR and AR brand experience. However, this doesn't mean that, overnight, everyone will be 5G enabled. Launching a product or brand communications too early could lead to failure, with too few people able to use it. We are looking at the take-up of 4G to understand when early adopters and the early majority will have the technology, so we can advise clients accordingly.

This is just part of the puzzle, however; consumers need to feel comfortable using the technology and this is to do with societal, as well as individual, attitudes. In the UK, QR codes as part of out-of-home communications flopped for many reasons, not least because initial experiences were often poor and people felt uncomfortable interacting with the technology in a public sphere. Walking up to a poster and holding their phone to it made people feel awkward – although, in China, QR codes have flourished and this behaviour is now the norm.

Adept market research can be used to predict the right time to enter the market. Using predictive techniques such as asking how people in your area will do things, rather than what the individual will do, has been shown to be a better way of predicting elections, and we are embracing this theory for technology use.

Emphasis

What should the business focus on? What is the key benefit to the consumer? What if 5G offers 10GB/s and has ultra-low latency – who cares if this means the realisation of the Internet of Things and mixed reality? Translating technology speak into consumer benefits is key.

Asking consumers what they want from a technology of which they don't have experience rarely yields good insight. Great researchers can use different techniques, however – such as laddering – to understand what the benefits are that consumers want.

Henry Ford may have said "if I had asked people what they wanted, they would have said faster horses" – but the main benefit they wanted was something that got them from A to B quickly. The key finding is that consumers want something to get them to places quicker. The key insight for business is develop a product that delivers speed and communicate that your new product (the car) is faster than a horse.

Jeff Bezos, founder of Amazon, recently said: "No customer was asking for Echo. Market research doesn't help. If you had gone to a customer in 2013 and said: 'Would you like a black, always-on cylinder in your kitchen – about the size of a Pringles can – that you can talk to and ask questions of, and that also turns on your lights and plays music? I guarantee they'd have said: 'No, thank you.'"

Consumers might not want a black Pringles box that plays music, but they might want to order their shopping, hands-free, in the kitchen.

Don't build up your part

People don't love brands. People love their cats, not their cat-food brand. Successful brands make people's lives easier. People who buy from Amazon and Ford don't love them, but these brands do make people's lives easier.

In understanding how to change human behaviour, I often reference BJ Fogg's behaviour model. Core to the model is the equation B=MAT, whereby behaviour change needs three things: motivation (I want to use the AR technology) ability (I have a 5G phone) and a trigger (I saw a poster advertising this). When these three things come together, you get behaviour change – and effective research can help to uncover this.

Sometimes, communication messages don't work because the motivation isn't there, as brands have assumed they are loved. Thinking about all the potential that VR and AR have to offer consumers, and putting this into the context of the Fogg Behaviour Model, can benefit brands.

It's all about picking a topic that resonates with the audience, and identifying an audience to which that communication appeals. This is where great advertising can help. Advertising – and great market research – is not about being efficient (in the short term), but more about being effective in the long-term development and success of the business.

Jennie Roper is head of insight at Kinetic

To be frank

Blind is an anonymous discussion app for employees of the world's biggest tech companies. Co-founder and head of US operations Kyum Kim speaks to *Impact* about how the platform offers insight on issues such as harassment and pay transparency

What does Blind aim to do?

Blind's mission is to bring transparency to the workplace. We allow verified employees to have honest discussions anonymously and allow companies to get unfiltered insight into employee sentiment.

How many users do you have?

We have 2.5m worldwide, including more than 52,000 employees from Microsoft, 38,000 from Amazon, 15,000 from Google and 12,000 from Facebook.

How do you verify users and guarantee anonymity?

We have a patented infrastructure that allows users to create an account with their work email, which verifies that they work at that company. Once verified, all user accounts and activity on Blind is disconnected from the email-verification process.

Which topics do people engage with most?

Users exchange real-time information about their companies and industries, and engage most on topics that will help advance their careers, such as compensation, interviews and negotiation. Other popular topics dive into workplace rights – such as discrimination and retaliation – work-visa issues and pay transparency.

Users trust our anonymous platform – which is why we see a lot of posts that address issues employees are not comfortable discussing openly in their workplace, including cases of harassment.

Tell us why you began surveying this group

The initial idea behind Blind surveys came from realising that it is the only platform that can gather real-time sentiment of employees about current issues. We publish the survey data to give honest



representation of employee sentiment, and partner with media outlets to deliver results to users and the public.

We generally run surveys for about a week and gather more than 10,000 responses. We can receive thousands of responses within a couple of days and compare results by company. To prevent the survey results being biased, we do not incentivise users to participate. However, they have been shown to answer questions voluntarily on topics that are relevant to them.

How are the questions chosen?

We run surveys on issues relevant to our users and that are already being talked about within the platform – including pay transparency, non-disclosure agreements, employee monitoring, compensation, retaliation, workplace burnout and harassment. We also ask about timely topics related to companies – for example: 'Has Mark Zuckerberg devalued Facebook?'; or 'Should Google provide a censored search engine in China?'

We can target users by companies and industries. Depending on the topic, we find the best audience to run the surveys to and can break down results by company, to visualise the sentiment towards each issue.

Is your research being used by the tech companies?

Many have reached out to us about partnering, to understand their employees and industry trends better. We are excited about exploring this and are working to improve our surveys to proceed in this direction. We have heard stories about HR leaders using our platform as they have begun to recognise that it is where feedback and opinions about company policy can be discussed frankly.

What's your ambition for the platform?

For the past five years, we have focused on building a secure community where professionals can have unfiltered discussions about work. What we have realised from feedback is that these discussions often represent the sentiment of the employees very accurately. We believe Blind can offer further insight for companies by offering sentiment-analysis tools and customised surveys.



Quantifying the value of work



It's fair to assume that, if you're reading this, a large part of your day job will involve assessing the effectiveness of marketing campaigns – or, perhaps, testing the feasibility and market fit of new product designs.

The insights team is one of the most disciplined functions in any company when it comes to measuring business impact and we hold our stakeholders to high standards when it comes to building that measurement into their plans from the start. However, it's extremely rare for us to hold ourselves accountable to the same standards of measurement when it comes to assessing the value created by our work.

This is a difficult challenge, but one we must rise to if we are to continue competing for resources in companies awash with data.

In my previous role at O2, the company reorganised a wide range of analytics and research functions into a single, centralised business intelligence team. Any team whose job it was to look at customer data was brought together into this function spanning everything from CRM and profitability analysis to

social media monitoring. The cultural benefit of doing this was that there was suddenly a single source of truth when it came to understanding our customers, and the new structure unlocked opportunities to collaborate across all of these disciplines.

However, it also meant the insights team was now expected to report on the value we were creating, consistent with other teams that were directly connected to commercial performance. As the strategic analytics team could show that they migrated several thousand unprofitable customers onto new data plans, creating several million pounds of profit, we were expected to demonstrate the revenue benefit of our investments into brand tracking and customer segmentation. Think about the last

insights study you ran and try to quantify the value it created in monetary terms. It's a tricky thing to do.

We landed on two routes to quantify the value of our work: cost savings and potential revenue. Demonstrating that we were saving the company money, or identifying new price points, dramatically improved our ability to ask for greater investment in insights. Fast forward eight years, and this challenge is even more pronounced in the technology industry, with teams across the company accessing vast ranges of commercial data to measure what they're doing. And yet, I've never had an agency pitch – or even mention – how they propose to measure the investment in a consumer insights study.

This has to change if we are to thrive as an industry in this age of data. Simply showing that research helps increase the company's level of understanding in customers is fine, but when a chief finance officer is looking at that next to a revenue-per-head model from a sales team – or the results of a product experiment that shows a causal link between a new product feature and

user growth – it's easy to see where the investment will go first. With the new audience insights team at Twitter, we tried to build this in from the start. Every project we work on comes in via a request system that is automatically tied to revenue databases, so we can analyse the revenue being generated by our work. We can finally demonstrate that account teams at Twitter are 24% more likely to win a pitch if they are supported by our team. This has dramatically helped our ability to pitch for resources and grow our function.

Next time you pitch to a client or design a study, think about how to build measurement into the plan itself. Proving the return on investment of insights has never been more important.

● **“Demonstrating that we were saving the company money, or identifying new price points, dramatically improved our ability to ask for greater investment in insights”** ●

The new insight power couple



As the old saying goes, ‘two heads are better than one’, and the new insight power couple – data science and behavioural science – illustrates this perfectly. The relationship may be in its infancy, but we are already seeing clear evidence of the mutual benefits of this pairing.

Behavioural science can add value to data science in two simple ways – by helping to define the underlying questions and hypotheses that guide data collection, and by offering a behavioural lens through which data can be explored.

Data science can amplify behavioural science understandings by analysing human behaviour on a larger scale: exploring millions of variations, looking for trends or patterns that may have been obscured by large amounts of data. This can also lead to greater personalisation of behavioural science interventions, targeted at an individual level.

Tackling fraudulent claims

Most people who claim and receive benefits are honest. Some, however, receive benefits for which they are ineligible. This might not always be because of dishonesty; sometimes, the application forms are unclear, or there is a misunderstanding about what counts as ‘work’ and what doesn’t. Nonetheless, paying benefits to people who shouldn’t be receiving them is a burden for governments.

In 2018, the New Mexico state government, in the US, decided to tackle this problem with a new strategy. It used data science to analyse benefits claims to establish patterns in applications. This data could suggest which applications had a higher-than-average chance of being fraudulent, but the information was not proof enough to act. Investigating each individual with a higher-than-average chance of committing fraud would also have been time-consuming and costly – and mislabelling someone as making fraudulent benefit claims risked causing long-lasting detriment.

Partnering with Deloitte and Harvard University, the New Mexico government realised that incorporating behavioural science

might offer the answer to this ‘last mile problem’. Re-examining the big data they had collected through a behavioural science lens, the team identified three key moments in the application process when claimants gave inaccurate information: entering the reason for leaving employment; answers to ‘Did you work this week?’; and responses to whether claimants had completed at least two ‘work search activities’.

The researchers realised they could use simple, yet effective, behavioural science nudges at these moments:

- **Key moment 1:** although claimants knew their previous employers would be contacted, this detail was not salient and so was easily ignored. To fix this, people were shown a copy of the letter that would be sent to their previous employer to verify their reason for leaving before they submitted their answer.
- **Key moment 2:** the team realised that individuals were finding it easier to be dishonest when dealing with an inanimate computer screen, rather than a person. On top of this, lying about working for only one or two hours didn’t seem immediately dishonest. To address this, the team used priming and social norms: a pop-up screen would appear before claimants entered the information, saying most people report their earnings honestly. They also made claimants sign their initials next to their statements, because research has shown that personal attestation can improve honesty.
- **Key moment 3:** Every week, claimants had to make a plan and commit to enquire about, apply for, or interview for at least two jobs in the coming week. When they completed the next week’s form, they were reminded to review these goals.

The New Mexico state government had used data science for years to try to reduce fraudulent benefit claims, but it was not until it

applied behavioural science insights that it understood the significant problem of mundane deception.

One of the key ways big data can work with behavioural science is to create more targeted behavioural interventions. Data science can pull out macro and micro trends or patterns, and extract material specific to smaller groups – even down to an individual level. New tech, such as the Internet of Things, means data can become available in real time, allowing for advanced personalisation and nudges tailored to context.

Nudge* is a financial education agency specialising in computer-based training programmes to help adults understand their financial rewards and benefits in the workplace. It discovered that, in spite of the benefits to users, most of these programmes have low levels of engagement and people tend not to complete the training.

Nudge* realised this was primarily caused by two things: the financial education training does not occur at a salient time; and people tend to prefer the ‘head in the sand’ method of thinking about their financial future – known as the Ostrich Effect.

Nudge* had access to a huge volume of information about those who had signed up to take the course, ranging from small details – such as when they tended to log on to the system – to larger ones,

such as their salary. Using this information and inspiration from behavioural science literature, it developed a way of offering personalised nudges to encourage people to do the training at the right moment.

Research shows that instigating a change of behaviour is more likely if behavioural routines or habits are disrupted at the same time. The most successful nudges are triggered when someone

experiences a significant life change, such as when they move home or change salary.

The nudges include emails, texts or WhatsApp messages – depending on people’s personal preference – which contain advice and information specific to an individual’s current life change; for example, what happens to your

pension now that you have moved home?

Messages are personalised depending on the person’s age and salary, and encourage behavioural goal setting and benchmarks (what we call anchors) for saving, and use social norms by offering tips and tricks from peers.

These strategies increased platform logins by 34.9% in the month after the introduction of nudge communications.

“Research shows that instigating a change of behaviour is more likely if behavioural routines or habits are disrupted at the same time”

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Health alert

Opinium has carried out a mental health audit on the market research industry and identified the top five things employers can do to help with staff mental health. Jane Bainbridge reports

Looking after our emotional – as well as our physical – health is increasingly seen as a vital part of our wellbeing. It's been a long time coming. While physical ailments are often visible, mental illness is mostly invisible and, feeling stigmatised, sufferers have invariably felt that they must hide their problems.

But attitudes are starting to change. With a younger generation apparently experiencing unprecedented levels of emotional stress, schools are introducing good mental health programmes to help students. Rates of depression, anxiety and self-harm are all rising among children and young people and, to help tackle mental health problems early, the Mental Health Foundation launched its Make it Count campaign.

In the working world, more enlightened employers have been taking note of this wind of change and ensuring they are creating mentally healthy workplaces with systems to help those in need. But how widespread is this and how does market research fare as a sector?

This is what market research agency Opinium wanted to identify with its mental health audit.

Its employee study gained an understanding of people's mental health at work nationally and it specifically looked at the market research sector by surveying the Market Research Society's members earlier this year.

Opinium gained 2,000 responses from its national panel and 1,441 from the market research sector – 509 in-house respondents and 791 who work on the agency side.

It also garnered qualitative responses from its pop-up community to add insight.

To audit its findings, Opinium used the Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS). This scale was developed by the University of Warwick

to monitor mental wellbeing and consists of 14 statements such as 'I've been feeling useful' with five response categories, scored one to five on – 'none of the time', 'rarely', 'some of the time', 'often', and 'all of the time'. An overall wellbeing score out of 70 is calculated. The statements are all positively worded and cover both feeling and functioning aspects of mental wellbeing.

The survey looked at: general wellbeing, such as stress levels at work; absence and illness, including days off work for mental v physical health; culture and support, including things respondents wanted to see introduced; and the degree of openness around the topic.

Opinium found that 53% of workers in its national survey have struggled with their mental health, with 40% of employees saying they can talk openly to their manager about their mental wellbeing. However, 35% of workers are not offered anything to support their mental wellbeing – and, unsurprisingly, it is this group who are most likely to have below average mental wellbeing.

The market research industry appears to be under greater stress than the population at large, with 85% of market researchers agreeing they have struggled with their mental wellbeing in the past

year and 77% saying it had affected their work.

Sophie Holland, research executive at Opinium, who led the research, says: "The fast-paced environment of agency life is a likely contributor, and in-house researchers cite unclear expectations as one of their main stresses at work.

"Though there are some differences between agency and in-house, it's clear that mental wellbeing needs to

be addressed in the market research industry as a whole, as 85% of market researchers have struggled with their mental wellbeing in the past year – including feeling low, anxiety, stress, burnout, panic attacks and 'other mental health problems'."

The research points to certain groups being more vulnerable than others. Research managers and executives have significantly lower mental wellbeing than partners/directors (WEMWBS scores of 45.3 compared with 48.2).

It's often said men struggle to talk about their mental health more than women, with several campaigns around wellbeing particularly targeting men. In this research, male market researchers had lower mental wellbeing than their female counterparts (WEMWBS score of 45.5 for men compared with 46.7 for women).

● **"We don't think of a 'work-life balance' – it's all life. The days of sitting at a desk from 9am to 5.30pm, five days a week, are gone"** ●

In terms of our working life, the top stresses identified by market researchers were: workload (59%); impending deadlines (54%); risk of projects going wrong (45%); poor work-life balance (42%); and unclear expectations (38%).

Of course, researching mental health must be handled carefully too. James Endersby, chief executive at Opinium, explains: "Some of the considerations and challenges the team faced were: the huge importance of ensuring participant welfare throughout the research; safeguarding participants' identity during open-ended questions; ensuring consistent measurement; the phrasing of questions and trying to ensure the simple representation of complex and abstract concepts."

The market research respondents were asked about barriers to opening up to their employers and more than a third (36%) said they didn't think it was necessary to tell them, with 24% saying they didn't think their employer would be able to help. Just under a quarter (23%) said they were embarrassed and 22% said they were worried their employer wouldn't understand. Just less than one in five (18%) said they didn't know how to talk about it.

"It's embarrassing. I feel (wrongly I'm sure) that for a man to say so is still perceived as weak or fussy," was the open-end response of one male agency research manager aged 29. A female in-house research executive said: "I have never said anything because people gossip at work and I don't trust that my personal business will be in confidence. I just keep on smiling, and cry when I go home."

So, what can companies do to establish better practices for mental wellbeing among their workforce? The top five initiatives that have the most enhancing effect on mental wellbeing scores, according to the WEMWBS scale, are:

- enforcing mandatory breaks (29%)
- cultivating a culture of openness and transparency (29%)
- recreational classes at lunch or after work (24%)
- a mentoring scheme in place with the company (24%)
- 'duvet' /mental health days (23%).

Some companies are getting it right. "My line manager was amazing. He told me about a time he had suffered similar, how to get signed off and assured me that I should take that time to look after myself," said one female associate director.

● **Warwick-Edinburgh Mental Wellbeing Scale (WEMWBS) © University of Warwick, NHS Health Scotland and University of Edinburgh, 2007, all rights reserved.**

5 tips on... creating a mentally well workplace

- **Encourage people to talk and, if you need to, lead by example and share your own experience**
- **Be prepared – have a dedicated mental health first aider; this will signal that you treat mental health the same as you treat physical health**
- **Create a safe space for people to talk about the stresses of the job – don't let them take that home**
- **Be aware of what's happening in your business – there are always signs when someone is suffering, so don't ignore them: ask the hard questions**
- **Make it part of your hiring strategy – make prospective employees aware that you are a 'safe space' and prospective managers aware that this will be part of their job.**

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

Do I need to name the client?



In this, my last *Impact* column on legal developments, I decided to focus on the single most-asked GDPR question by researchers: do I need to name my client? The short answer to this question is ‘it depends’. And so it does – on the relationship between parties; the type of research study; the tolerable level of organisational risk; and, most importantly, the understanding of the data subjects and the sensitivity of data being captured.

Although, in most studies, naming the commissioning client is not problematic, sometimes it can have significant consequences and adverse impacts, such as in spontaneous awareness research, commercially sensitive product development tests or longitudinal studies. In these cases, disclosing the client identity can reduce methodological rigour by introducing bias to the responses, compromising commercial confidentiality and market sensitivity, or impacting on trend data where attitudes on behaviour, for instance, are measured over time, and the results are no longer comparable.

So, in the following paragraphs, I’ll try to elaborate on that initial short answer.

Is the client the source of personal data?

Where a client supplies personal data, such as a sample list from their customer database, they will need to be named. This is legally required and allows you to be sufficiently transparent in meeting the data subject information requirements. The information will need to be given at an appropriate point in the data-capture activity, generally at the start of data collection.

Is the client receiving personal data?

Recipients of personal data must also be named; if a client is receiving personal data rather than aggregated and anonymised data, they must be named as a recipient of personal data. As above,

this information will need to be given at an appropriate point in the data capture activity, generally at the start of data collection.

Is the client a data controller?

The hardest issue in deciding whether the client needs to be named is when the roles of the client and researcher as controllers, processors or third parties are uncertain.

In many research studies, a commissioning client will be a controller and the full-service agency, plus any subcontractors used by the agency, will be processor(s). However, in some cases, research suppliers may also be joint controllers (with the client). What’s critical is whether the client and research supplier are jointly ‘determining the purposes and means’ of processing the personal data. Deciding on controller/processor must be based on the facts of the situation and reflected in a contract between the parties.

Under the GDPR/DPA 2018, controller(s) must be named at the time that any personal data is obtained. If the commissioning client is a controller then they must be named, but views differ as to whether this requires the client to be named at the beginning of the data-collection exercise or if there is some discretion for naming them at the end.

MRS has published guidance, interpreting the requirements in the GDPR on naming the data controller as giving some leeway on when the controller must be named. However, remember that the more broadly this requirement is interpreted the less likely it is that the processing will be sufficiently transparent.

Risk-based decision on layered disclosure

If, as a researcher, you think naming the client at the outset will adversely impact the rigour and robustness of the research then

consider whether it is appropriate to name them at the end. This approach is more likely to be appropriate if the research agency is a controller (with the client) or the client is a third party not providing or receiving any personal data from the research study.

If naming the client is deferred, then it is important to put in place safeguards. For example:

- Name the controller agency at the start of the study
- Make clear to data subjects that the client joint controller will be named at the end of the data-collection exercise
- Give assurances that any personal data collected will be deleted if, at the point that the controller is revealed, they object, wish to withdraw their consent, and/or no longer wish to participate.

Data Protection Impact Assessments (DPIAs) are useful tools for examining and documenting decisions made on this – and should be prepared and shared between client and researcher.

“Maintaining and building consumer trust in the protection of personal data must be reflected in all decisions on research approaches”

Privacy and ethical research

MRS has continued to liaise with the Information Commissioner’s Office

(ICO) and issues on controllers and processors are being considered by the ICO and other EU regulators. Additional guidance should be published before the end of 2019. In the interim, researchers and commissioning clients need to make a risk-based (but privacy-centric) decision on the best approach to take.

Privacy always needs to be understood as a fundamental right of individuals. Risk-based decisions under GDPR must keep sight of the importance of the social contract with research participants and the need to promote transparency and understanding of their rights. Maintaining and building consumer trust in the protection of personal data must be reflected in all decisions on research approaches.





Playing to our strengths

Attempts to celebrate the one-year anniversary of GDPR were met with little more than an eye roll in many quarters. I, for one, feel that being clear about my privacy rights helps me rebalance the relationship I have with commercial suppliers. Although, why I was suddenly hit with 40% more spam than I used to receive is puzzling me!

The position of MRS, however, has always been to welcome the legislation; the rigours of compliance are hugely outweighed by the need to protect personal data and be transparent in how we use it.

With more than 200,000 reported cases in Europe in the first 12 months – and double the number of reported data breaches in the UK compared with previous years – it has been a promising start for what has been widely recognised as a ‘transition year’, with heavier GDPR fines to come.

Quality protects everyone. Taking care of people’s privacy protects not just our participants, but also our authority as an industry. MRS continues to intervene when an agency or client appears to fall short of their obligations – and we have raised high-profile cases with political parties in

the past, and continue to challenge them. Ethical data use is so important in these hyper-political times.

The days of paying lip service to ethical practices are certainly gone. Even the platforms seem, finally, to be acknowledging their responsibility to lead – rather than purely acquiesce to – best privacy practice (see p58 for the Delphi Group discussion on this topic).

More can be done, however, as new nefarious practices pop up.

One such practice is what we’ve labelled ‘plugging’ – political lobbying under the guise of research. It makes its entrance for the first time in the new Code of Conduct – to be issued in the autumn – alongside ‘sugging’ and ‘frugging’ (look them up if you’re not sure).

Self regulation means we are entrusted to identify and weed out practices that purport to be research, but are not, even if that leaves us feeling like we’re playing an endless game of Whack-A-Mole.

GDPR has proven it has teeth, and standards have never been more needed or valued by the public. All of this plays to the strengths of our industry, enshrined as they are in the legacy of more than 70 years of ethical practice.

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Sector and MRS news

New guidance on GDPR

MRS has published new guidance to ensure that your policies and practices are compliant with GDPR and the Data Protection Act 2018. Our *Data Protection & Research Guidance 2019*, for MRS members and Company Partners, was developed through informal consultation with the Information Commissioner’s Office, and is available on mrs.org.uk

Intelligence Capital report

A recent MRS and Kantar Report – *Responsive Business: Creating growth and value through Intelligence Capital* – gives insight into how the most effective organisations use and integrate their insight. Developed in consultation with members and the MRS Senior Client Council, and building on Kantar research, the report recommends a framework that puts research, insight and data analytics at the heart of business strategy. Download the report at mrs.org.uk

DPO service

If you have not yet appointed a data protection officer (DPO) to assist in your compliance efforts, MRS offers an external DPO service, provided by Privacy Partnership, which is tailored for Accredited Company Partners. See more at mrs.org.uk

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- The benefits available in your MyMRS account include: GDPR resources; pre-recorded webinars; the Knowledge Centre; Sage Research Methods; guidance on the Code of Conduct; case studies; and *IJMR* (for CMRS and Fellows).

www.mrs.org.uk/membership/benefits

Diary dates

Member events

Speaker evening: Debunking age-based stereotypes – Millennials v Baby Boomers

July's speaker evening combines two perspectives that demonstrate how generational stereotypes and misconceptions can cloud our understanding.
11 July

Celebrate summer: MRS Scotland and the Social Research Association

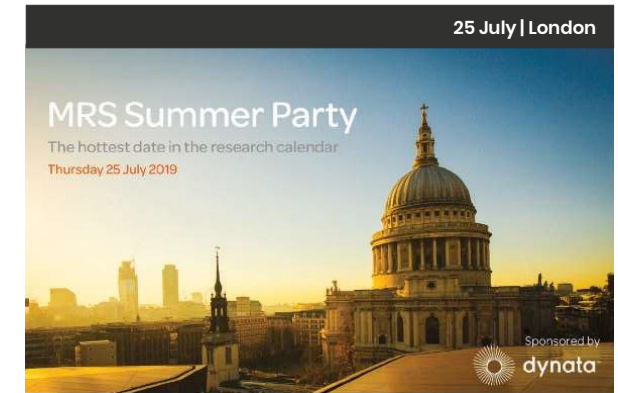
Come along and test out your croquet skills at the Meadows Croquet Club in Edinburgh. Catch up with friends and colleagues, old and new.
18 July

Speaker evening: The Unusual Suspects

Hear how a research project helped disability charity Scope reach beyond its 'usual suspects' to engage new audiences, challenge its ideas and redefine its brand and purpose.
12 September

Professional webinars and speaker evenings are free for members.

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



Conferences

MRS Summer Party

A highlight in the research calendar. Always a sell-out – so, if you fancy rubbing shoulders with the great and the good in the sector, you'll have to move quickly on this one.
25 July

Internet of Things – Consumer Research Conference

This conference explores the technology trends, the relationship between brands and customers, and the changing nature of marketing and insight.
26 September

Training highlights

Effective depth interviewing

Understand and develop the skills necessary for effective depth interviewing in a wide range of qualitative research situations.
11 July

Psychology in qualitative research

For researchers who want greater access to the inner world of their participants and how to elicit and use it to inform their insight.
16 September

Insight-driven innovation

This highly practical 'learning by doing' course outlines innovation

approaches and how insight professionals can embed innovation projects in their organisations.
17 September

Crafting and designing presentations

Helps researchers to refine how they present research findings, with a focus on storytelling and visual impact.
18 September

Semiotics made practical

Covers basic theories and techniques, and how semiotics fits into the wider research process, plus it gives you the chance to do your own hands-on analysis.
19 September

Influence and impact

Helps participants evaluate the personal impact they have upon those they interact with day to day, enabling them to increase this influence for business benefit.
20 September

Data privacy in research

Suitable for those with no prior knowledge of data protection – gives an overview of key concepts in the UK Data Protection Act 2018 in the context of the research sector.
24 September

7



Professor Sir David Spiegelhalter is the Winton professor for the public understanding of risk at the University of Cambridge, associate fellow of the Centre for Science and Policy, and author of several books. His most recent is *The Art of Statistics*

1 Why are relative risk factors so poorly understood?

Good research has shown that relative risks – such as some food increasing a cancer risk by 20% – produces an exaggerated impression of the importance of risk. So it's the researchers' and media's fault if they are poorly understood, as audiences are not being told the crucial factor: 20% of what? Without knowing the baseline risk, relative risk is impossible to interpret. On principle, I try to ignore every story that mentions 'an increased risk' – except as an example to criticise.

2 The media are often quick to be blamed for the misunderstanding of risk – is that a fair criticism?

I have a high regard for most health and science journalists. I believe – and this is backed up by research on press releases – that researchers and press offices are as much to blame as the media when it comes to exaggerated risk stories. And, of course, the sub-editors add clickbait headlines.

3 Does our maths education equip us to understand and manage numbers in the real world? If not, how should it be changed?

School mathematics is derived from a 19th-century model of what should be taught and makes little attempt to teach useful skills. We need to teach far more

about data science and data literacy, but this does not necessarily belong in the maths curriculum. Unfortunately, the English education system is based on subject silos, so cross-disciplinary skills get sidelined. Core Maths is a step in the right direction, but teachers need a lot of support, and materials need to be carefully developed and evaluated.

4 You rated surveys as a relatively reliable form of stats in your book *Sex by Numbers*, but not so internet panels. Why were the panels considered less reliable?

Good old-fashioned face-to-face surveys, based on probability sampling, are still the gold standard, but are increasingly expensive – and people are less willing to participate. Panels are cheaper and more efficient, but are self-selected and they only have to do online responses. However, more sophisticated analytic techniques, such as multi-level regression and post-stratification (MRP), show promise in improving accuracy.

5 What piece of research, with which you have been involved, are you most proud of – and why?

Perhaps the work on performance comparison and in healthcare: I am delighted when I see funnel plots and cusums [cumulative sum control charts] being used. I did not invent these

techniques, but – inspired by our work on the public inquiries into Bristol child heart surgery and Harold Shipman – I worked on their wider dissemination.

6 Has the growth of data visualisation helped the public understanding of maths and statistics?

I love good visualisations – just think of what Hans Rosling, the Swedish academic and statistician, was able to achieve. They must be a good thing, but need responsible use, so as not to mislead people.

7 How comfortable with each other are the worlds of data science and statistics?

There was a time when some in the statistical community viewed the rise of data science as a threat, because some commentators seemed to think bucket-loads of data would mean the ideas from statistical science were no longer necessary. As I argue in my recent book, *The Art of Statistics*, this is a complete delusion.

The more data there is – and the more diverse the applications – the more important become basic ideas of data quality, bias, model adequacy, uncertainty and so on. This is being recognised, and I look forward to a time when it is accepted that data science and statistics are fields with huge overlap – but one is not a subset of the other.



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