RIDING THE WAVE

Social media has changed the face of communication, giving everyday people the chance to speak up and be heard. Is it also changing the face of research? By **Bronwen Morgan**

On a Friday evening in July 2016, protesters released hundreds of cockroaches and locusts into two central London branches of burger chain Byron, forcing their closure.

The act was part of a backlash following the company's alleged involvement in an immigration sting against its own workers: 35 members of staff had reportedly been told to attend a Monday morning health and safety meeting, but immigration workers arrived and started interviewing – and arresting – Byron staff on suspicion of breaches in immigration laws.

As news of the arrests spread, Twitter erupted with angry messages aimed at the chain. According to media monitoring platform Visibrain, in the first 24 hours alone, Byron received nearly 17,000 tweets, and the hashtag #BoycottByron was used more than 8,000 times. Twitter was also used – alongside other social media platforms – by activists to mobilise numbers for the insect stunt, as well

as other protests against the chain.

Georgina Parsons, head of communications at Visibrain, says Twitter – more than any other social media platform – has become central to this type of consumer activism. "According to Visibrain's research, one in five public relations
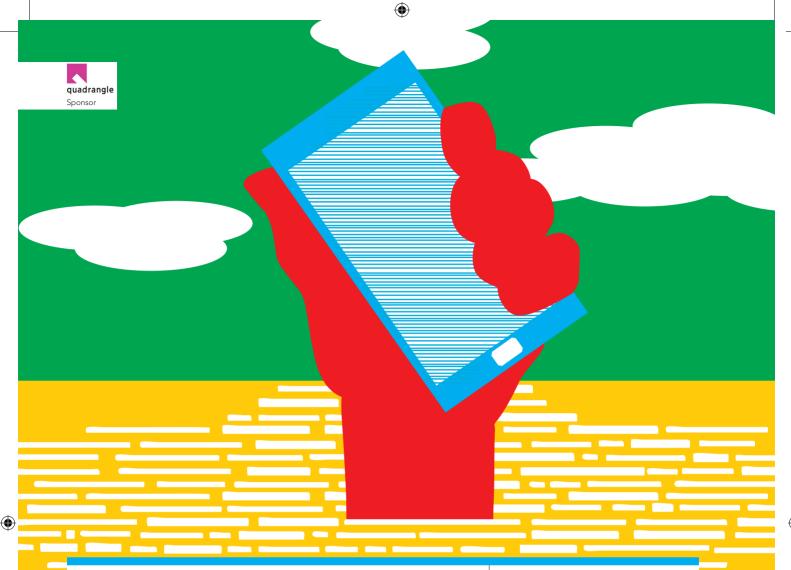
> **" According to Visibrain's research, one in five public relations disasters break on Twitter, while 94% spread as a result of the platform "**

disasters break on Twitter, while 94% spread as a result of the platform," she says.

"In spite of its smaller user base, this makes Twitter more influential than Facebook, YouTube, Instagram and even blogs as a tool for activism and consumer complaints."

Parsons points out that while the ▸

THE GROWTH IN MOBILE CONNECTIVITY

By Sara Ballaben, senior technology analyst at Mintel

Despite a gradual plateauing of smartphone ownership over the course of 2015, the period from September 2015 to April 2016 saw penetration edge upwards again and reach more than eight in 10 UK adults.

Improved software and bigger screens have allowed for a wider and wider range of activities to be performed on smartphones, which has led them to gain an ever more central role in consumers' daily routines. Back in 2013, screen size was identified as being a major barrier to smartphone shopping. However phablets – smartphones with a screen of 5" or larger – now account for 46% of smartphone owners in the UK, and this has broken down the barriers to m-commerce along with many other brand-related online activities, including reading product reviews and liking/following brands on social media.

As consumers increasingly buy into mobile devices, growing demand for mobile data connection is putting pressure on global wireless capacity, which is likely to accelerate R&D investments into 5G technology. While mobile connectivity has not represented a threat to fixed broadband so far, thanks to lower data speeds, this could change when 5G hits the market in 2020. Competitive speeds of 1Gbit/s could significantly undermine consumers' need for a separate fixed broadband connection, further encouraging mobile connectivity and internet access via smartphones.

Growth in social media use is also fostering the mobile connectivity trend, with 58% of smartphone owners having accessed social media via their handset in the three months to December 2015, and 23% of users choosing a smartphone as their primary access method, rising to 42% of 16- to 24-year-olds.

Such popularity of social media and mobile connectivity strongly destabilises existing marketing paradigms, as the reach of branded content on these platforms is still limited, and always-connected consumers are consistently challenging brands' claims and choosing rather to trust the opinions of their peers.

While, initially, the growth of peer influence led to the increasingly critical importance of user reviews in arriving at a purchasing decision, bad publicity related to fake reviews is driving scepticism about their authenticity and validity. This is paving the way for an increase in the importance of 'influentials' – consumers that have established themselves as online personalities – for instance through a blog with a considerable number of followers whose choices they are able to influence.

Brands are therefore trying to overcome consumers' reluctance to interact with them on social media by fostering second-degree exposure, either by hiring these internet personalities to post and share on their social channels to endorse a brand, or by publishing fun and entertaining content that appeals to social media users and effectively creates 'virality' – which can significantly broaden the audience that is exposed to a brand's message.

Furthermore, fast-spreading, end-to-end encryption for messaging services is also likely further to reshape brands' relationships with consumers, as the enhanced security of such services should positively impact trust and confidence in using them. This, coupled with ongoing developments in automated interaction through chatbots, could position messaging platforms such as WhatsApp and Facebook Messenger as the go-to media for brands communicating with consumers, taking the emphasis away from brands' apps and mobile websites as communication or even transactional channels.

Byron story is a classic example of bad behaviour being called out by "the Twitter mob", it's also an example of the public not necessarily having the full picture before commenting.

"As Byron's PR team later revealed, the burger chain was simply one part of a much larger immigration initiative organised by the Home Office," she says. "While it was clear that Byron could have handled the raid better, Twitter's damning reaction came before all the facts could be released; a common problem with such a real-time social network."

Regardless of the legitimacy of the uproar against Byron, it's a stark example of the PR storm that brands must now be prepared to deal with should they put a foot wrong (or appear to, at least).

There are many who believe that this ability to call out perceived bad behaviour represents a shift in the power balance between consumers and brands. According to Dr Nick Baker, managing partner of research agency Quadrangle, this shift has been enabled by the explosion of connectivity – which in itself has evolved with the advent of mobile broadband and increased ownership of mobile devices (see box on p28). He calls it "the second wave of digital", and thinks it's one of the biggest disruptors to the world of marketing – and market research – to date.

"It's actually a much, much bigger change than on the first wave of digital, although it would be impossible without it," says Baker. "Because what we [researchers] do is try and understand people so that we can direct brands, organisations, the government – whoever it is – in terms of the potential impact of their communications, their plans and their strategies.

"At the core of that are people – customers – who essentially because of the second wave of digital have now got exponentially greater power

in the game. It's completely transformed relationships between brands and customers; what technology has enabled and what social media has enabled, is an open voice for stuff that was previously private."

Sharpened focus

Iain O'Neil, digital director at Nuffield Health, is all too aware of how easily brands can be tripped up by this, and the importance of staying alert to the threat.

"It definitely sharpens your focus," he says. "I know that in the past I've done things that were sub-optimal on the basis that I wouldn't personally hear from people that had been impacted by the decision I'd forced upon them."

> " What technology has enabled and what social media has enabled, is an open voice for stuff that was previously private "

At the time of speaking to *Impact*, Nuffield Health was launching an online class booking tool for 35 gyms the company had recently purchased from Virgin Active. "If it doesn't work," he says, "it's highly likely that the first thing anyone is going to do is tweet about it.

"That's why we've got teams working on a Sunday. We're not willing to let it go live unless it's the best possible thing we can ship. The risk is too great. Your personal risk is too great – can you imagine the conversation with the chief executive tomorrow if Twitter is awash with people who are moaning about their digital customer experience?"

Social media as a tool for business

The growth in social media use has

not been restricted to the consumer side. A review by McKinsey of its own survey data between 2005 and 2015 looking into business use of social media (and other related social technologies) suggests three distinct, progressively more sophisticated phases of use of these tools.

According to McKinsey, companies began in the mid-2000s with 'trial-and-error' applications, including using platforms like Facebook and YouTube to expand their marketing mix to attract younger consumers, and to interact with existing customers. Around 2010, the focus switched to fostering collaboration, which encompassed using internal platforms to connect employees, as well as gathering insights and managing knowledge.

In the most recent phase, McKinsey's research suggests that social technology has been 'supporting and shaping strategy' – meaning that it has been used to forge both internal and external networks that allow many stakeholders (including those outside a company) to engage in strategy development. More than half of the companies surveyed 'see further blurring of boundaries among employees, vendors and customers, as social technologies create new processes for marshalling ideas'.

Digital labour

Given the clear opportunities for brands in having these blurred boundaries, Dr Lina Dencik, a senior lecturer in the School of Journalism, Media and Cultural Studies at Cardiff University – who specialises in developments in new and social media, civil society and political activism – questions how far the balance of power has really shifted.

"I teach a class on social media and politics and we look at corporations within that, and we look precisely at this question: has it actually made corporations more ▶

ethical because they are now supposedly more accountable to consumers through being more visible?"

Dencik refers to the concept of 'sousveillance', which is the notion of monitoring from below, as opposed to surveillance, or monitoring from above. Social media – along with digital and wearable technologies – gives ordinary people the ability to monitor institutions of power in a way that hasn't been possible before, as it allows people more easily to record the world around them. This, of course, encompasses corporate misbehaviour as well as that of public bodies – such as police violence (see box on p34).

"A lot of people would argue that corporations need now to be more ethical, and behave more properly because their practices are being monitored by consumers, and if consumers don't like something that they do, not only can they see it, but they can also use social media to campaign around it and make it visible," Dencik says.

But while she recognises that there are instances in which consumers are empowered by social media, she believes the fact that corporations have been able to use social media to extend their brand – by using consumers as advocates – means it has also been a very useful marketing tool.

It's been particularly useful, she says, in enhancing the ability of companies to shift the focus of customer communication to be around experiencing their brand, rather than just selling products. And beyond this, she says, companies are using social media to turn consumers into a form of 'digital labour'.

People data

"Corporations have been able somehow to take advantage of the fact that you now have a whole crowd that you can source knowledge and information from," she says. "Like Coca Cola inviting users to design its bottles, for example. It's essentially free labour. Consumers end up feeling like

they're part of a brand, but they're actually doing work for it."

Beyond this surface benefit, Shawn O'Neal, former vice-president of global marketing data and analytics at Unilever, and founder of SO-Analytics, believes the availability of social media information is of huge benefit to brands. He says that 'people data', which he defines as "the personal and social media information that is being collected every day by every transaction that we as modern human beings are making in the world around us" allows greater personalisation than ever before.

"Making advertising a reportable, trackable, measurable currency overturns 100+ years of scattered spending and hopeful intentions," he says. "This concept began with the internet bubble, but has been significantly limited by technology until storage became almost costless via Hadoop [an open source distributed data storage and processing framework] and cloud solutions over the past eight or so years."

TURNING SOCIAL MEDIA NEGATIVITY INTO POSITIVITY

By Ruxandra Mindruta, community manager, Brandwatch

According to *Harvard Business Review* the volume of tweets targeted at brands and their Twitter service handles grew 2.5 times from 2013-2015. Similarly, the percentage of people who have used Twitter for customer service leapt nearly 70%, from 22% to 37% from 2013-14. Research from McKinsey shows that 30% of social media users prefer to contact via social media than by phone (17% of those over 55). With this many people engaging with companies on social, there is a high potential for negative comments to be directed at your brand. Here are a few tips to manage this:

Respond quickly to complaints
Because of the immediacy of social media, there is an expectation of a quick response. Even if a brand isn't able to resolve a query directly, it should respond by acknowledging the customer to

prevent things escalating. A quick response can also turn an easy-to-solve complaint very quickly into a positive, and ultimately you may create a brand ambassador from a complainer.

When phone company O2 came back to customers with a human touch after its Twitter account became flooded with complaints during a service breakdown, it dramatically changed sentiment towards the brand.

Don't delete comments. Don't get defensive. Don't pretend you were hacked
Keep your cool no matter how far you are pushed by a customer, and never forget, it is a public forum. It's tempting to delete or respond angrily if a customer criticises your business, but this rarely helps your cause. After Amy's Baking Company appeared on an episode of *Kitchen Nightmares* its

Facebook page was inundated with complaints from customers detailing their own personal experiences. The owner firstly responded with "Most of your icons show you to be fat, overweight losers with nothing in your lives but disgusting people". After continuing the rant for a few more posts, Amy then claimed to have been hacked and that the FBI was investigating the issue.

Acknowledge mistakes
Depending on the seriousness of your mistake, speed is also crucial. When a KitchenAid employee accidentally tweeted a derogatory tweet about president Obama's grandmother, meant for a personal account, speed was important, as was elevating the authority from where the apology came. Its head of brand Cynthia Soledad responded personally – via the company account – within eight

minutes of the original tweet and KitchenAid was ultimately applauded for its swift action, rather than berated for the foolishness of its initial accident.
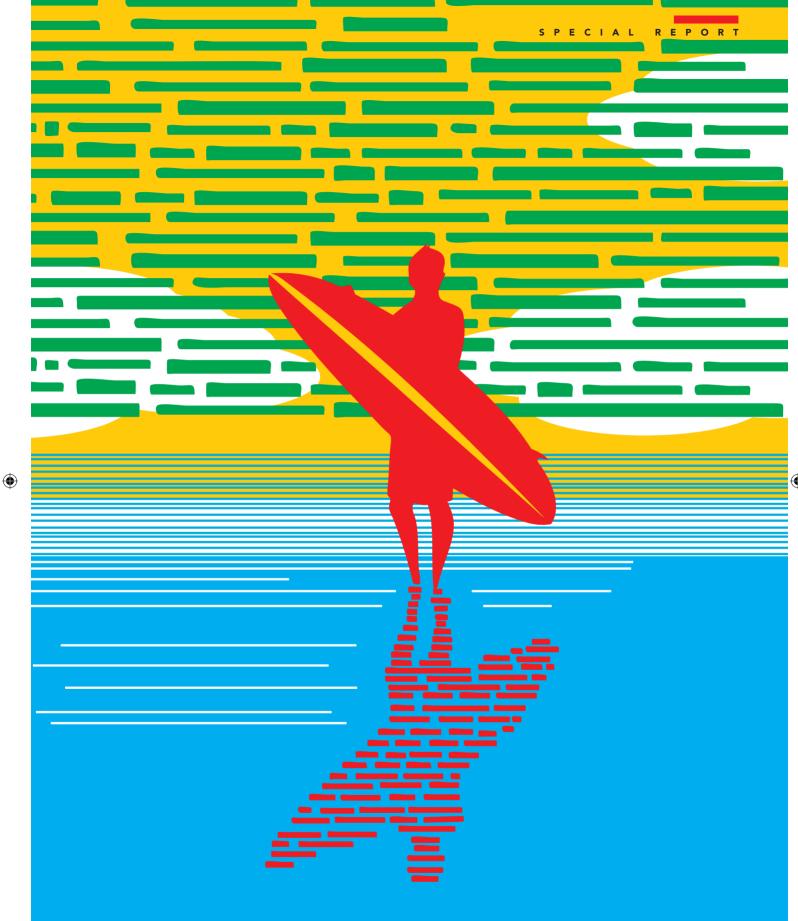
Keep complex issues offline
If you can't resolve the problem within a couple of responses, it's usually better to offer to continue the conversation via a more appropriate medium.

Monitor your chosen platforms carefully
If you don't have the capacity to monitor a particular platform, then don't set up a profile. You're not obliged to be present on all forms of social media and customers will expect to use it as a two-way channel if you are. There are various options for monitoring your brand, including robust social media monitoring platforms with alerts so you never miss a mention.

HOW TO STAY RELEVANT IN THE ERA OF BIG DATA

By Frank Hedler, director of advanced analytics at Simpson Carpenter

With the continuing rise of big data, the landscape of the insights industry is changing dramatically. For decades, market research professionals have been the main providers of consumer insights, but now it seems that big data has turned insights into a commodity. With the rise of digital, businesses have access to increasing volumes of enterprise data from various sources. Paired with Machine Learning and Artificial Intelligence, insights can be created almost automatically.

In this era of big changes, the market research industry faces three major challenges in the struggle to stay relevant:

Accessibility – The majority of successful big data stories involve data that market research agencies do not have access to: enterprise data such as website traffic, customer information and transactional data are all used to create tailored propositions and to predict consumer behaviour. These data sources are owned by our clients, and they usually do not share these with agencies. Instead, they keep investing in technology and human resources to use this data internally, and to generate insights from it without external help.

Skillsets – We, as an industry, are still catching up in terms of technology stack and skillsets. Many market research firms have introduced the role of the data scientist, and started hiring professionals with computer science or similar degrees previously not found in market research. But we cannot tackle this issue with recruitment alone. We all have to become more tech savvy.

Mindset – We still depend too much on traditional survey methods, because this is what we know and what we feel comfortable with. And so, millions of surveys are completed every year, most online, and increasingly on mobile devices. We are relying on online access panels to supply ever fresh samples for often extremely small target groups. And we are still boring respondents with ratings scales and matrix questions, despite the talk about gamification and creating engaging survey experiences. A change in our mindset is needed; we must free ourselves from survey research and look for new, fresher sources of insight.

One possible route, of course, is social media. But we need to look beyond the main platforms. Social media is wherever users create and sh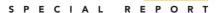are content. There are countless product and service review sites, consumer forums and blogs offering a vast range of consumer experiences and personal views on all aspects of everyday life.

Product reviews, for example, are an increasingly important source of information for consumers. When deciding which phone to buy or hotel to book, we are more and more influenced by the opinion of others, as we research and compare alternatives. It is therefore essential for businesses to know what consumers are writing and reading about their services – and how they stack up against their competitors. Using text mining and analytics, data from customer forums, blogs and review sites can provide richer and deeper insight about a business's strengths and weaknesses than any quantitative survey could ever offer.

▶ O'Neal believes that the combination of evolving computing power and software, the growth in the options available for analysing and transforming data, and the recent EU GDPR law change – which aims to give citizens back control of their personal data and simplify the regulatory environment for international business by unifying EU regulation – together make a "perfect storm for the creation, access and use of people data for dynamic algorithmic decision making at scale".
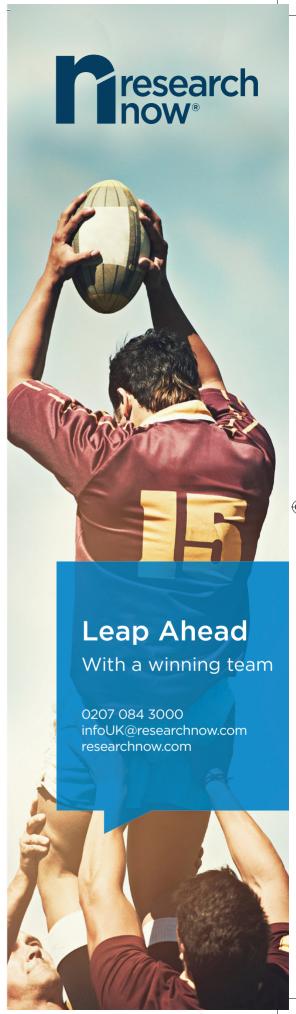
The research revolution

What's more, O'Neal also feels that the widespread access to this information has the power to transform 'traditional' research.

"Research has always tried to harness and understand people, narrowing the field of vision to consumers and statistically significant segments," he says. "With people data, it becomes a question of simplifying incredibly robust data sets and insights, rather than attempting to harness enough data to create a simple takeaway."

A compelling example of the power of this freely-available data is Football Whispers, a football transfer predictor built by research firm MMR International.

Developed alongside the Department of Computer Science at the University of Sheffield, Football Whispers uses big data, social listening and a specially designed algorithm to take transfer rumours from the web and social media, and use this information to calculate the actual likelihood of each rumour coming to pass. The algorithm takes account of the volume of 'chatter', the authority of the sources and the recency of the story, to produce this calculation.

MMR International is now working on replicating the approach within the financial services sector. This would see the company using social media to understand what ▶

TOP TEN TWITTER MOMENTS OF 2015

While social activism and displays of solidarity dominated the Twittersphere in 2015, there were also some more light-hearted trends.

#PrayForParis and #JeSuisCharlie
In January, terrorists attacked the offices of satirical magazine Charlie Hebdo in Paris, leading to people across the world rallying around the phrase 'Je Suis Charlie' to show their support and grief. Ten months later, in November, Paris saw further attacks on its cultural centres, leading to the hashtag #PrayForParis emerging as a top trend, and #PorteOuverte, a hashtag intended to help people in Paris looking for shelter, also becoming popular.

#BlackLivesMatter
This hashtag, a unifying message encompassing a number of incidents involving police and black citizens, was tweeted 9m times in 2015.

#HomeToVote and #LoveWins
The #HomeToVote hashtag became popular when Irish citizen expats shared their experience of returning home to vote in the gay marriage referendum on May 21, while #LoveWins represented the Supreme Court's decision to legalise gay marriage in the US on June 26.

#RefugeesWelcome
People around the world used this hashtag to call on European countries to grant entrance to refugees seeking asylum from the Middle East and Africa.

#IStandWithAhmed
Fourteen-year-old Ahmed Mohammed from Texas was detained and handcuffed at his school for bringing in a homemade digital clock that authorities feared was a bomb. In less than six hours, the hashtag was used 370,000 times worldwide, and garnered responses from public figures including President Obama.

#BBCDebate, #ArgentinaDebate, #elxn42, #GE2015, #IndiaVotes
Discussions on major elections around the world were a big part of the Twitter conversation in 2015.

#FIFAWWC
Tweets about the FIFA Women's World Cup were viewed 9bn times between June 6 and July 5, making the tournament one of the largest global sporting events of the year.

#PlutoFlyby
Buzz around the NASA New Horizons spacecraft, which came within 7,750 miles of Pluto's surface and captured close-up images, generated 1m tweets on July 14.

#BlueandBlack or #WhiteandGold
More than 4.4m tweets were generated on February 26 and 27 as people around the world argued over the colour of a dress shown in a picture that had been shared online.

@Caitlyn_Jenner
In June, Caitlyn Jenner's Twitter account gathered more than 1m followers in just over four hours, breaking the record set by @POTUS (President Obama).

(Figures sourced from https://2015.twitter.com/most-influential)

▸customers want, and big data analytics to apply the algorithm to identify which needs – if addressed – would have the most impact on customer experience.

Social listening

Beyond these complex algorithms, Ellie Osborne, research director at MMR International, is a strong believer in the future of social intelligence for unlocking passive insight in a way that is more comparable to traditional primary research.
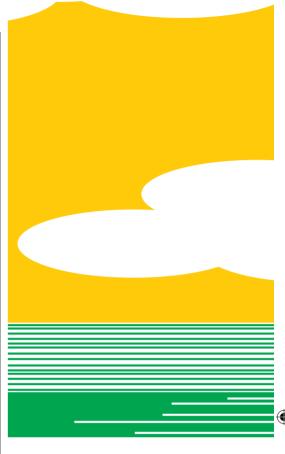
Osborne's clients – in her role at a previous agency – had mostly been relying on trackers to gauge customer sentiment, when she came across a project where another agency had set up a Google + group to gather similar types of insight.

She felt that the approach addressed a challenge that she had frequently come up against – of stakeholders querying how questions had been asked, and therefore doubting the validity of the subsequent responses.

"The great thing with social media and making use of online discourse is that it's direct, it's not framed at all," she says. "You're getting that in-the-moment spontaneity and I feel the commentary that you can find is so valuable. There are so many insights to be drawn from it."

Osborne concedes that there is, as she puts it, "a bit of a snob factor" related to this approach – she's heard many dismiss it as "just a form of desk research".

"And if you strip it back to bare bones, yes, I suppose it is desk research," she says. "But you've got all that spontaneity and commentary and in-the-moment feeling that people share these days. The world has changed and there's so much out there we should be making use of as researchers, as part of our toolkit. We shouldn't be ignoring it."

Firefighting

Another aspect of using this approach is that organisations monitoring sentiment analysis – big organisations often have whole teams dedicated to this – are not only able to track any negative feeling towards their brand, but can intervene to try to change the conversation (see box on p30).

Peter Markey, brand and communications director at insurance provider Aviva, sees the importance of staying abreast of this. He says that the rise in popularity of price comparison websites has left insurance companies less able to rely on repeat custom, and so more reliant on brand advocacy. He also has experience to draw on from his previous role at Post Office.

"One of the things I introduced at Post Office was that if we had a specific amount of feedback about a certain branch in a given timeframe, we set up an immediate response

mechanic, where we would get people on the ground to investigate and help sort it out," says Markey. And, he adds, this information is useful not only from a PR perspective, but also from an insight perspective.

> **The what and why is the crucial distinction of why there will always be a role for market research – to help understand why people did stuff**

"Part of the challenge in retail particularly – and Post Office is a great example of this – is that there are clearly certain hours that are pinch points, which your data won't always show you because it gets smoothed a bit, unless you're looking at it forensically.

"So you may find that while NPS [Net Promoter Score] overall is good, it's because between the hours of 8am and 11am and 3pm and 5pm it's terrific, but it's awful over lunchtime. And that's where this sort of immediate feedback is actually quite helpful – to help you get under the skin of what customers are feeling. The data is one thing, but you can't beat real everyday stories."

Industry implications

For Quadrangle's Baker, the ability to do this has implications for the research industry, not just in how information is collected, but for the whole insight model.

"If you look at the research industry you need to consider two basic lines of thought," he says. "One is around methodology in terms of how we collect– or can collect – information because the old or the traditional research model

says: 'ask questions, get answers'. Well, actually, the original research question was: 'have a look'. Mass observation – now, in a way, that has already come back. It's mini observation rather than mass observation, but it's the same principle, right?

"So I think there are massive implications in terms of moving away from a relatively binary mode of: 'ask questions, get answer'. What we now know from behavioural economics is that some of the answers that you get if you ask questions aren't right.

"Now, you can derive questions that really are what we traditionally use research to help us answer, from that data. But you can't tell why people did stuff. That's the critical part. The what and why is the crucial distinction of why there will always be a role for market research – to help understand why people did stuff.

quadrangle
Sponsor

▸ "It's just that that role will change because lots of stuff you'll already have the answer to, because everybody will start to go 'data first'."

Be a part of it

Tim Britton, head of strategy and transformation, r2i at PwC UK, and former UK CEO at YouGov, agrees that the role of researchers has fundamentally changed, and he sees it as part and parcel of the big data movement (see box on p32).

Where previously brands had to rely on primary research – and perhaps some transactional data – to understand their customer properly, he says the advent of social media has meant that they can now hear the voice of their customers very directly. As a result, the production of data – something that he feels researchers have historically got caught up in – is becoming not only a less useful skill, but a less significant part of the business. What's more, he says, it would be foolish for market researchers to ignore the power of social media as a source of data.

"We have to understand it and be part of it," he says. "It's not about it being separate and other – as an industry we need to be able to draw upon social media data; we need to understand what it means and we need to understand how to access it. It's another tool that we need to have at our disposal. It's not a question of this thing happening over there – it should be part of what we're doing."

But, he warns, brands relying on social media data must be wary of "squeaky wheel syndrome" – that is, not having an understanding of how important the noise that's being made on social media genuinely is for the brand. And you can't understand that, he says, unless you have a more detailed view of what's

happening. Which is where market research comes in.

"If you're only listening to people on Twitter or Facebook or wherever, you get their opinion at that moment in time on the particular issue they're talking about.

"What you don't know is how they act more generally as consumers, citizens, voters, whatever it is that you're interested in. And that's what research can give you. That's where we're able to say: 'that really matters because they're not just a loud group of consumers, but they're economically active over here and therefore they have a disproportionate impact over there'.

"In other words – knowing whether they need to take this seriously and do something, or instead realise that while the people they're listening to are of course important – in so far as they are their customers – they are not a particularly influential group.

"It's that kind of understanding that our industry can bring to bear." ▮

THE SECOND WAVE OF DIGITAL

Kick-started by the launch of the iPhone in 2007, the defining truth about the second wave of digital is that it makes personalisable technologies almost universally accessible. This is driving a permanent and irreversible transformation in how we live, work, play, communicate and, most crucially, consume.

For some sectors and brands it is not too alarmist to describe this as an existential threat – one well captured in the brutal Silicon Valley mantra that 'If you're not a start-up, you're a turnaround'.

What makes the second wave of digital so powerful and empowering for people is the way that three distinct developments have come together to create a new consumer reality:

1 The emergence of mobile as the 'third computing platform' (after mainframes and PCs) across a wide range of connectable – and, therefore, networkable – devices. Mobile's significance is

growing exponentially as both the capabilities and global penetration of smart devices continue to increase rapidly. In less than a decade, the demand side has become networked, with consumers able to connect to each other and with supply-side organisations as they choose. Increasingly, consumers expect to do business on their own terms – deciding who, when, where and on what basis – as the norm.

2 The widespread availability of fast, high bandwidth connectivity (broadband, WiFi, 4G) and the apparently unlimited appetite among consumers for being continuously connected. Ongoing improvements in speed, bandwidth/network capacity and what smart devices can do are feeding this appetite.

3 The exponential growth of social media and other platforms across connected, often mobile devices. These networks are

always on, enabling any number of people to come together, communicate, and to discover, receive and share information of all kinds in real-time. The speed at which consumers have not only absorbed these networks into their lives, but have also learned to use and leverage them for their own benefit, is remarkable.

The combination of these three factors is game-changing for brands in a way that the first wave of digital never was. What we are seeing now goes beyond disruption; it is a permanent and irreversible shift in market power to the demand-side.

But the second wave of digital isn't really about digital, it's about customers. And it poses a profound challenge to our industry, calling into question established thinking and approaches, and raising important questions about how, through insight, we can best interpret a consumer world that is increasingly fluid, fickle and fast.

The need isn't for yet more digital research methods; it's for a better insight system and set of tools that bring together research and data to help clients stay close to what matters to customers – tools that show the ways consumers perceive value in different buying modes; how attitudes towards traditional concepts such as loyalty have moved on; how expectations and behaviours are impacted by rational and emotional influences; and how emerging concepts such as popularity and engagement are becoming more important to measure.

In the second wave of digital, where insight is a strategic imperative, our ability to take the lead on providing the answers to these types of questions will define our continued relevance and value as an industry.

Alison Camps, deputy chairman and partner, Quadrangle