

# IMPACT

ISSUE 1 2013

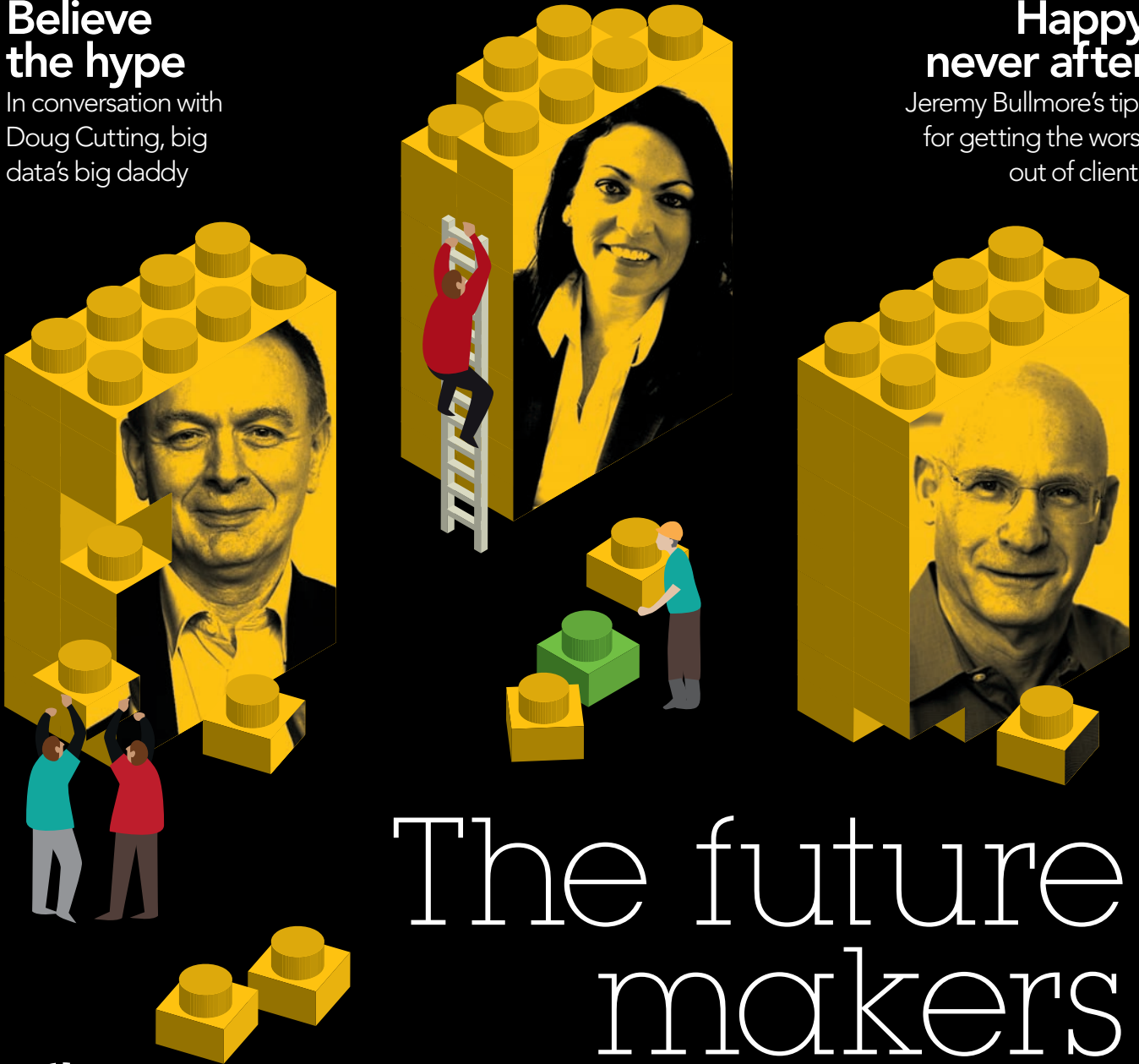
USING EVIDENCE & INSIGHT TO MAKE A DIFFERENCE

## Believe the hype

In conversation with Doug Cutting, big data's big daddy

## Happy never after

Jeremy Bullmore's tips for getting the worst out of clients



# The future makers

Lessons in foresight from Paul Ormerod, Roisin Donnelly, Patrick Barwise and others



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# Welcome to Impact



**Jane Frost**  
Chief executive,  
MRS

Earlier this year, I sent every member of MRS a letter. It was unusual in what it said and what it signified. Some of you may even have opened it, and hopefully a few read it too.

In the letter, I made a promise: to deliver a series of improvements to our world-leading suite of publications and websites, in terms of the range, quality and ease of access to content. And this magazine was a critical element of that promise.

*Impact* is an outward-looking magazine and it is very much focused on the future needs of clients. The value of research is in its impact on a client's business. Our special report on foresight, and the on-going series of Insight & Strategy interviews, provide plenty of examples of how research can achieve its full potential.

We have put a lot of thought into what our members will want from a magazine. We were also fortunate to have evidence on which to base our decisions in the form of last summer's member research.

But this magazine isn't only for our members. It's for the inquisitive among us – the searchers – those with a predisposition to want to understand why, as well as a professional stake in doing so.

So with that I'll hand over to Brian Tarran, editor of *Impact* and of the industry news website Research-live.com, a man who – like you – is paid to ask why on a daily basis.



**Brian Tarran**  
Editor

We started developing this magazine four months ago, but it's probably more accurate to say that *Impact* has been several years in the making. We've had years of discussion about how research is having to change – how it's becoming more commercially driven, more strategic in its recommendations. How 'nice to know' isn't an option anymore. That 'need to know' is all that matters.

So what is it that marketers need to know? And how can research help them? This is *Impact's* guiding philosophy: to look through the lens of the marketer and consider how evidence and insight can make a difference to their work. We start with an in-depth review of what is perhaps the biggest challenge facing

researchers today: how to turn insight into foresight. This isn't a problem that researchers alone are wrestling with, so we've brought in some outside help: economists, finance directors, venture capitalists and futurologists. Predicting future outcomes is never easy, of course. But I'm betting you'll find the article to be informative, inspiring and – yes – impactful.

So thanks for reading, and do let us know what you think of the magazine. Thanks also to our advertisers and section sponsors for supporting us in this new venture.

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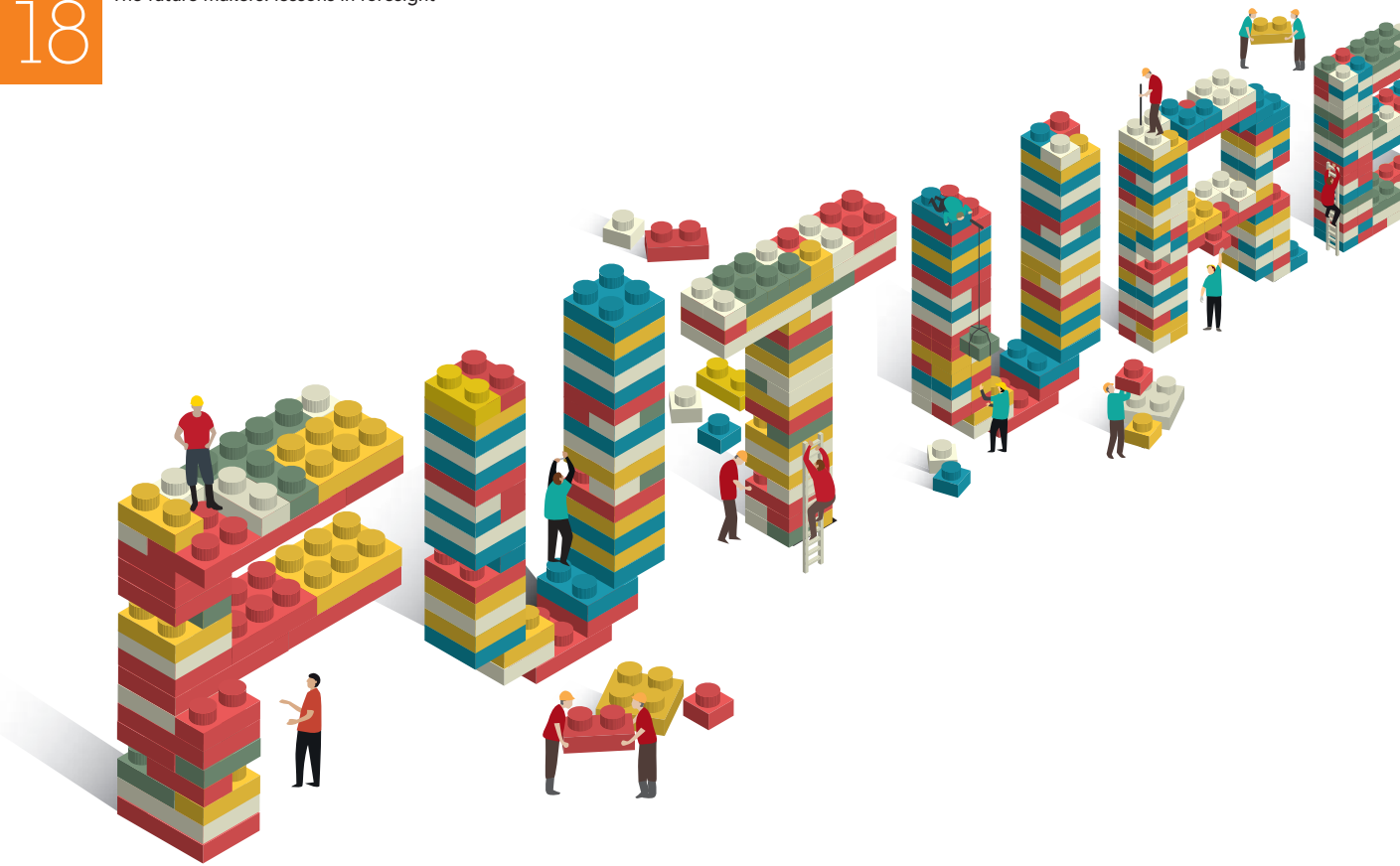
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Fast food, rapid feedback



CONTRIBUTORS

**Lucy Fisher**



Fisher is a freelance writer specialising in marketing. For this issue, she met David Boyle, SVP of insight at HarperCollins.

**Jane Simms**



A former editor of *Financial Director* and *Marketing Business*, Simms interviewed Yeo Valley's retail marketing head Dan Rusga.

**Richard Young**



Young is a freelance writer and editor who recently chaired two sessions at MRS Annual Conference. He wrote our cover feature on foresight.



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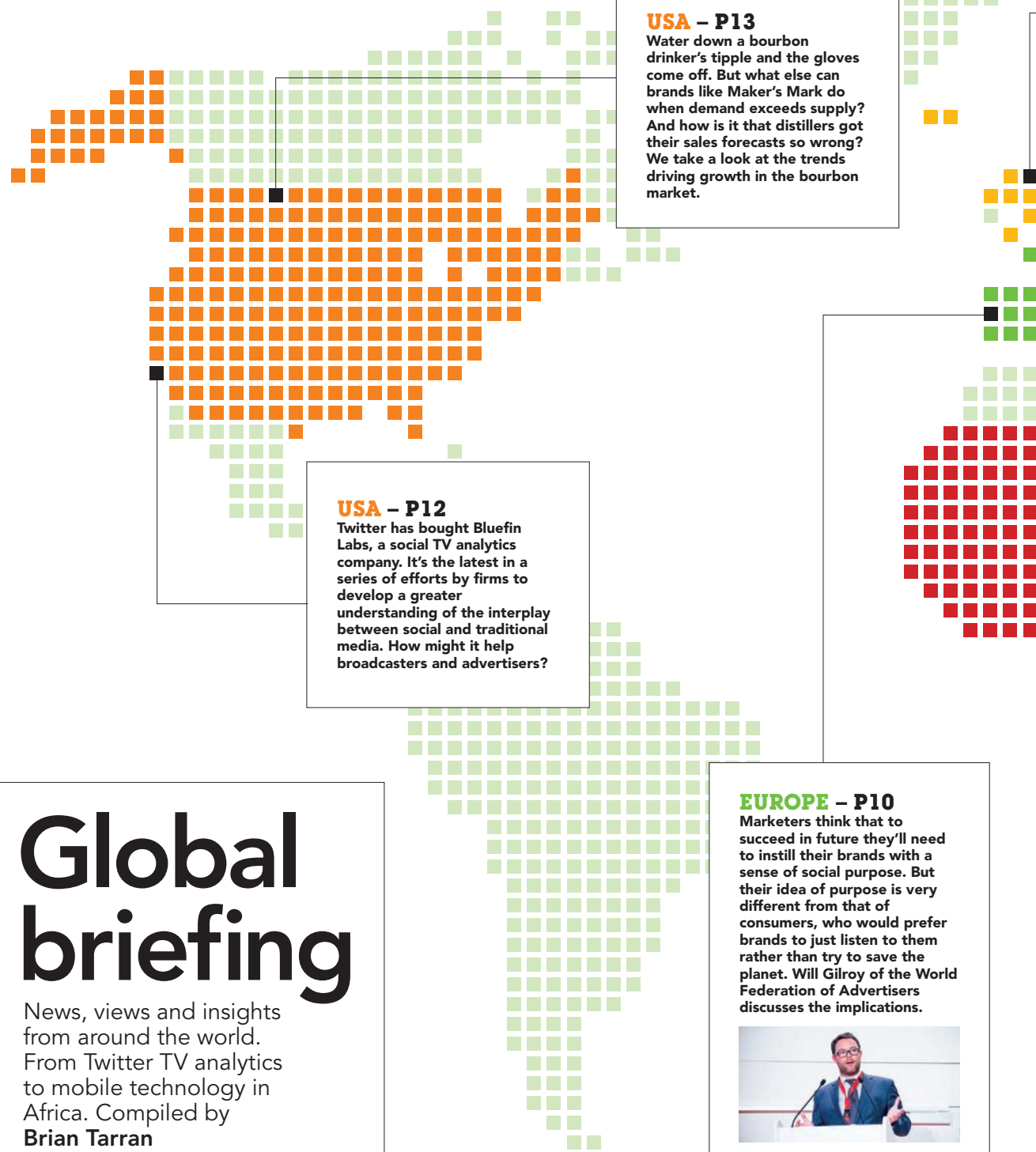
### Will Amlot



Amlot (willamlot.com) once photographed Nelson Mandela. He shot the portraits for the lead features in our Business and Careers sections.

**IMPACT**  
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**USA – P13**

Water down a bourbon drinker's tipple and the gloves come off. But what else can brands like Maker's Mark do when demand exceeds supply? And how is it that distillers got their sales forecasts so wrong? We take a look at the trends driving growth in the bourbon market.

**USA – P12**

Twitter has bought Bluefin Labs, a social TV analytics company. It's the latest in a series of efforts by firms to develop a greater understanding of the interplay between social and traditional media. How might it help broadcasters and advertisers?

**EUROPE – P10**

Marketers think that to succeed in future they'll need to instill their brands with a sense of social purpose. But their idea of purpose is very different from that of consumers, who would prefer brands to just listen to them rather than try to save the planet. Will Gilroy of the World Federation of Advertisers discuss the implications.



# Global briefing

News, views and insights from around the world. From Twitter TV analytics to mobile technology in Africa. Compiled by **Brian Tarran**

### UK – P08

A £19m research project, Route, funded by the outdoor media industry reveals that the average person passes 27 roadside posters each day. That's a lot of exposure. We review the journey Route took to arrive at that number. PLUS: How much insight is there in the world?



### WEST AFRICA – P16

We talk about a 'mobile revolution' in the Western world – but if you want to see the true transformative power of smartphones, you need to head to West Africa. Electric:Electric's Ashe Deleuil reports on how mobile phones are shaping business and society in Nigeria and beyond.

### ASIA – P14

Myanmar – formerly Burma – is open for business. But having spent years cut off from the world by sanctions, there is a lack of knowledge about the country's consumer class. TNS recently conducted a survey designed to fill this insight gap. Ralf Matthaes talks through the findings.

# UK

# All mapped out

Inside the outdoor media industry's £19m audience research overhaul

## 241

kilometres. That's how far the average British person travels each week – and it's a lot more than previously thought.

Outdoor audience measurement body Route (formerly Postar) has spent £19m to track 28,000 people using GPS technology and it has uncovered a 14% difference in stated travel versus actual travel.

This is good news for billboard advertisers and the amount of eyeball time they get. Route calculates that on an average day, an average person will encounter 27 roadside posters and 14 bus ads, while every tube journey takes in an average of 74 ads.

Route knows all this because it matched the GPS journey data it collected to a map of the 450,000 outdoor advertising locations (or 'frames') that line the country, developed a traffic intensity model, calculated the realistic opportunity to see an advert and then used eye-tracking studies to work out the likelihood that a passer-by would notice any given frame.

That's putting it simply. Developing the research system, also called Route, was a big task involving a huge amount of data. The GPS tracking provided Route's research partner, Ipsos MediaCT, with information on a person's whereabouts every second of the day for nine straight days. This works out at 670,000 records per respondent –

and 19bn records in total (and the database will continue to grow by 3.3bn records each year).

But "big data creates big insight which leads to big innovation", says Steve Hatch, the CEO of media agency MEC, whose enthusiasm for the new system was echoed by Glen Wilson of outdoor ad agency Posterscope. "We've been given a Ferrari and we need to drive it like we stole it," Wilson says.

Route should, in theory, allow advertisers to become much more targeted with their outdoor campaigns. Alongside the GPS data – which reveals the where, what and how of people's movements – each survey respondent also has to answer 250 questions about their lifestyles, media consumption and shopping habits, resulting in a bunch more data about who these people are.

"In the past, cynics could accuse out-of-home of being focused on panels rather than people," says Matthew Dearden, chief executive of the outdoor media owner Clear Channel UK. Not anymore.



Big data, big insight:  
MEC's Steve Hatch

# 3,600,000,000

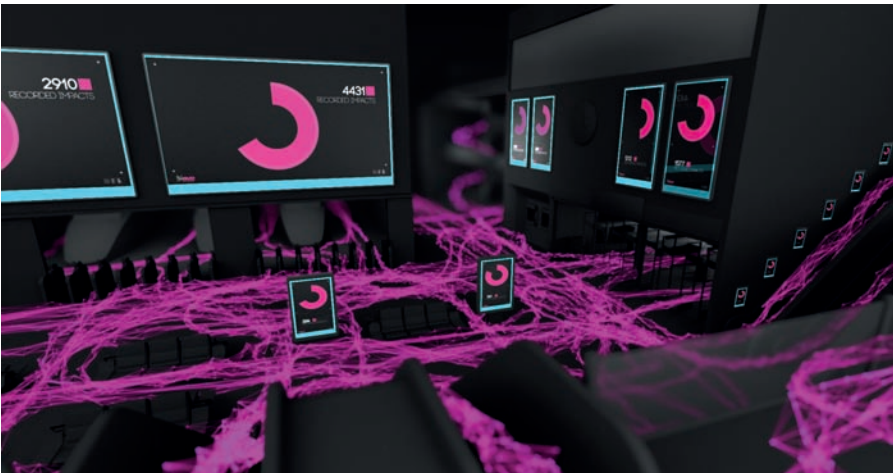
See that big ol' number there: 3.6 petabytes, or 3.6m gigabytes. That's how much insight there is in the world – or will be by the end of 2013. At least, that's according to a formula put forward by MEC's Steve Hatch.

Hatch reckons that there's a kilobyte of insight for every gigabyte of data, and IDC estimates that 3.6 zetabytes of data will be created, replicated or consumed this year. And so, with the aid of some (potentially

unsound) maths, we arrive at a figure of 3.6 petabytes-worth of insight.

But the really good news is that the amount of data is expected to double every two years between now and 2020. Insights all round!





Route's research shows that the average person gets exposed to more billboards than previously thought

,000,000

“ **IDC estimates that 3.6 zettabytes of data will be created, replicated or consumed this year. So if there's one kilobyte of insight for every gigabyte of data, there should be 3.6 petabytes of insight within that 3.6ZB** ”

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# State your purpose

Brands think that doing good will be good for business. But a 'social purpose premium' will be a tough sell in Europe



Will Gilroy

**H**aving a goal in life beyond making money – doing something to help others – can be immensely rewarding. Brand owners are banking on it. The results of a survey of marketers, presented in Brussels to mark the 60th anniversary of the World Federation of Advertisers (WFA), were almost unanimous: for brands to succeed in future they'll need to have a sense of purpose.

Companies are already starting down this path. Half of those surveyed are “fundamentally repositioning themselves in light of a renewed sense of purpose”, says Will Gilroy, the WFA's director of communications.

Take Unilever and its Sustainable Living Plan as an example: most marketers think 'purpose' involves creating programmes that impact positively on a community; help protect and improve the environment; or showcase other ethical business practice. Unfortunately, consumers see it differently.

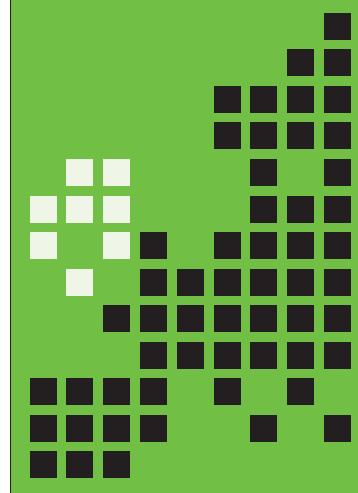
The WFA study was designed as a companion piece to PR group Edelman's goodpurpose survey, which has tracked consumer attitudes

to social purpose for five years. According to Edelman's research, listening to customer needs and treating employees well are two of the most important attributes for a brand. Ethical business practices, improving the environment and impacting the local community are ranked sixth, ninth and eleventh.

That's not the only discrepancy. According to WFA, marketers think developed markets like Europe and the US have the greatest concentration of purpose-driven purchase decisions. But Edelman points to China, India, Brazil, Malaysia and the United Arab Emirates, where more than 50% of consumers will pay a premium for brands with a purpose. Developed markets fall below the global average of 43%, with the UK bottom at 28%.

Part of this difference is cultural, says Gilroy. Many rapid-growth

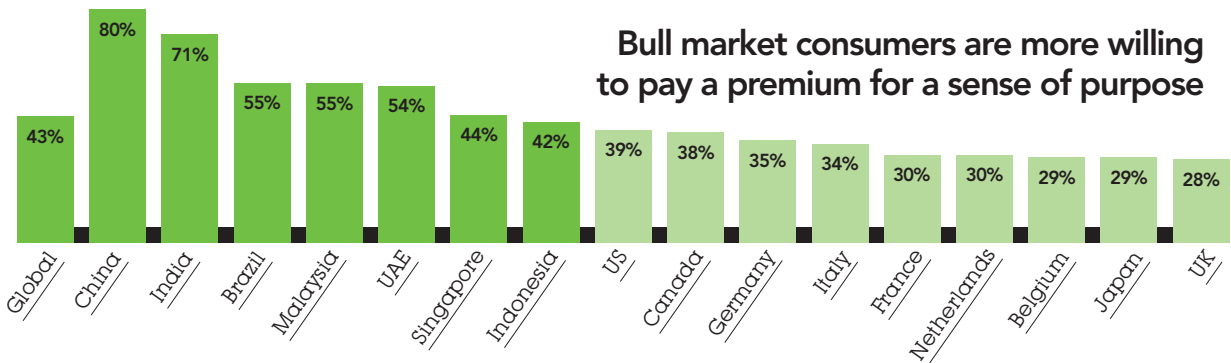
# EUROPE



markets are “collectivist societies”, not individualistic like much of the Western world. Muslims, for instance, have “an ingrained sense of charity – it's not an appendage like in our society. In these markets, many people grow up living next to poverty and adverse conditions. So having a sense of purpose is perhaps closer, more innate and more meaningful than in the West.”

In addition, places like China, India and Brazil have a booming middle class and these people might well have more spare cash than their counterparts in Europe. In our recession-hit times, it seems social purpose is a luxury some can't afford.

## Bull market consumers are more willing to pay a premium for a sense of purpose

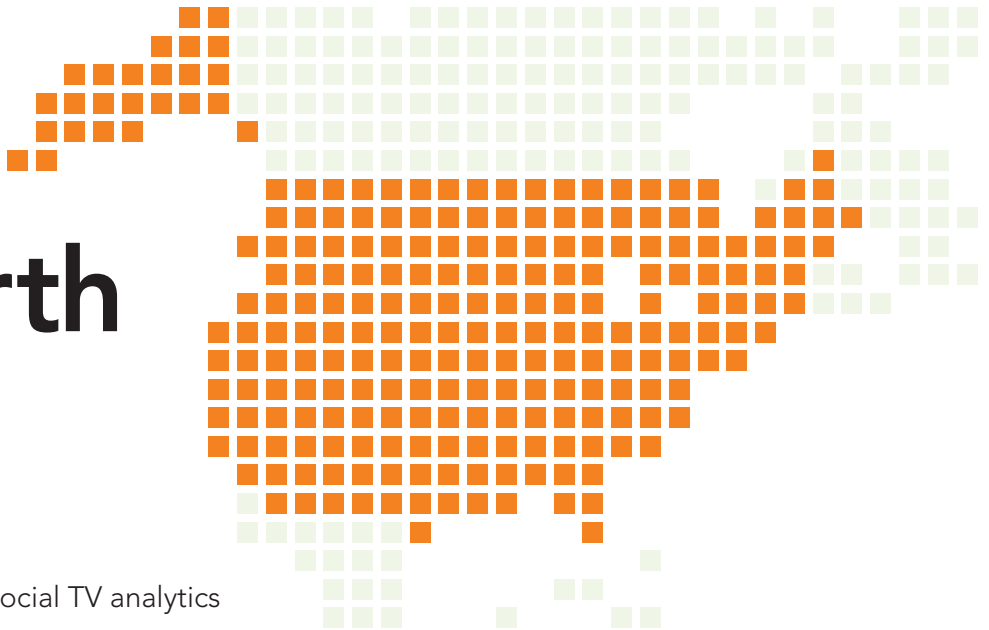


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**US**

# TV worth talking about



Why Twitter is getting into social TV analytics

**F**or many people, Twitter has replaced the watercooler as the focal point for TV discussion. Little wonder then that companies are racing to try to understand how those conversations are influencing viewer behaviour – Twitter included.

The social network recently bought Bluefin Labs – a social TV analytics company whose job is to analyse what shows people are talking about, what they are saying about them and how many other people are exposed to these 140-character reviews.

Twitter’s interest in Bluefin appears to align with its advertising business – which some are predicting will reach \$1bn in revenue this year. At least, it should do if it can convince increasing numbers of big TV advertisers to spend some cash socially.

On TV, advertisers want to know who’s watching what programmes and when – so it makes sense that they’ll want to understand who’s talking about those same programmes and at which point in the conversation it’s best to target them with a Promoted Tweet or other well-timed intervention.

“Brands love Twitter because it offers them an opportunity to communicate in real time with the most enthusiastic viewers of the shows they sponsor, or the ads that are scheduled during those shows,” says Stuart Knapman, a former BBC researcher

who’s now UK head of The Sound Research. “They can join the conversation or provide content that enhances the viewing experience.”

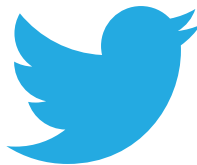
A study by Twitter’s UK team found that “Twitter and TV drive each other in a complimentary cycle. A hashtag on air can boost engagement by organising viewers to tweet and interact, while in the other direction, a TV-related trend or tweet in a user’s timeline can drive discovery.”

But different types of shows generate different patterns of



Stuart Knapman

Twitter activity. “The more that Twitter, broadcasters and media agencies can understand this,” says Knapman, “the more they can help brands to adapt their strategy to make the most of it.”



## Number-crunching

**\$70m**

Bluefin Lab’s rumoured price tag

**\$350m**

Twitter’s 2012 revenue

**\$1,000m**

Twitter’s 2013 revenue?

# What about Facebook?

“Facebook is a lot larger than Twitter, but a high proportion of conversation is hidden behind privacy settings and is not intended for wider consumption or aggregation. Twitter is public, and so we don’t face the same barriers. But the nature of Twitter versus Facebook is also an

important differentiation. Facebook prioritises content based on time, type and relationship – big topics or conversations are therefore ‘stickier’. This works well for major events but less well for live in-the-moment conversations. Twitter is completely hierarchical and based purely on time – the

more recent the tweet, the higher on the feed it appears. This is much better for the real time reaction of social TV conversations.”

**Simon Kendrick (@curiouslyp) is a media research specialist who has worked for ITV, the BBC and Essential Research**

Simon Kendrick



## Pour form

An attempt to meet growing demand for bourbon backfires on Maker’s Mark

Telling bourbon drinkers you’re planning to water down their favourite tippie is never a good idea. Just ask Maker’s Mark. By watering down the product – reducing the amount of alcohol by volume from 45% to 42% – the company hoped to fill a gaping hole in demand.

But in the eyes of dedicated bourbon drinkers “they committed a cardinal sin”, says Mintel drinks analyst Jonny Forsyth. A social media backlash, a u-turn and an apology soon followed.

Bourbon has rocketed in popularity in recent years, not just in its home market of the US but in places like France, Germany, Ukraine and Japan. Unfortunately, there’s not enough of it to go around. Bourbon distilleries have to decide five years in advance how much to make based on

how much demand they expect there to be, but most of the projections were way off. “Demand has taken off more than anyone could have predicted,” says Forsyth.

traditional older male bourbon drinker. Meanwhile at the top end of the category, innovations in small-batch bourbons are attracting whiskey connoisseurs. The

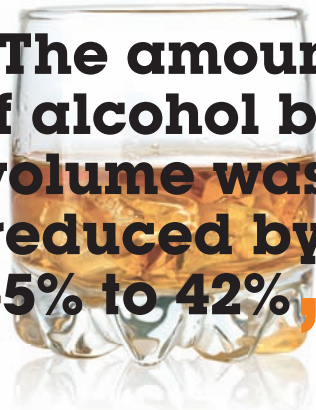
it the fastest growing of the bourbon segments.

While it’s understandable that bourbon brands would want to cash in on this demand, drinks firms need to be sensitive to the underlying trends that have led to this unprecedented growth.

“A lot of it has to do with innovation around exclusive, premium brands,” says Forsyth. “They only make a few batches of it and that’s the appeal. It’s not mass-produced for mass consumption, it’s made by artisans and sold only to a select few.

“So to come out and say, ‘We’re going to water-down the alcohol content’ is kind of like saying to the loyal drinker, ‘We’re willing to compromise on the taste that you love in order to meet mass demand.’”

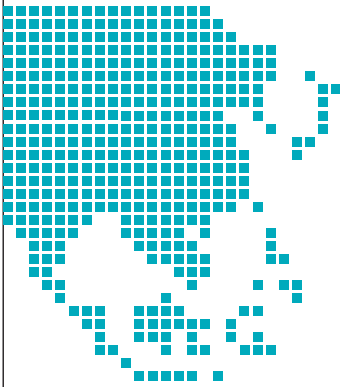
“The amount of alcohol by volume was reduced by 45% to 42%,”



Flavour innovation in the category is bringing in new drinkers. Brands like Jim Beam’s cherry-flavoured Red Stag range are more palatable to younger men and women than they are to the

latest data from the Distilled Spirits Council shows that super premium products like Woodford Reserve – which retail for upwards of \$30 a bottle – grew US revenue by 14% to \$222m last year, making

# ASIA



## Vital statistics

### Myanmar in 2012

GDP (purchasing power parity)

**\$54.05bn**

ranked 77th

GDP per capita (PPP)

**\$1,400**

ranked 206th

GDP real growth rate

**6.2%**

GDP composition by sector:

Agriculture

**38.8%**

Industry

**19.3%**

Services

**41.8%**

(Source: The CIA World Factbook)

# Myanmar rising

What awaits brands willing to explore one of Asia's last frontiers?

**W**ith its military junta slowly relinquishing control and international sanctions being lifted, Myanmar is opening up to new investment opportunities. Ralf Matthaes is TNS's man on the ground in the country formerly known as Burma. He sent us this dispatch.

Rich in natural resources, bordered by the global powerhouses of India and China, and currently benefiting from a substantial GDP growth rate, Myanmar is making some of the world's biggest brands sit up and take notice. We already have requests from clients, largely in the FMCG sector, who are interested in the opportunities Myanmar presents – particularly since the passing of the Foreign Investment Law in November.

Colgate, Nestle and Unilever are all entering the market as are several car manufacturers, and more than 90 telecoms providers have applied for licences. Even Coca-Cola has re-opened operations following a hiatus of more than 60 years.

But there's a huge insights gap. Questions frequently asked by clients are: What is going on? Should we enter? And how and where do we begin? To understand both the growth opportunities – and the barriers to growth – a snapshot of consumer behaviour and perceptions, as well as retail and trade dynamics, was needed. TNS recently conducted interviews with 11,000 people in 12 locations

in Myanmar. It was the country's largest ever study of consumers.

The survey established that around 67% of Myanmar's 56m inhabitants live in rural areas, and among the urban population the average monthly income is just \$190 per month. To give a sense of perspective, Myanmar's total economy and earning ability is about a third of Vietnam's and less than a sixth of Thailand's.

Within this context, consumer demand for cheaper and more accessible food is high. In urban Myanmar the average consumer spends 38% of their income on food. This figure is higher still in rural areas. As we saw in Vietnam some two decades ago, the majority of the population is more focused on filling their stomachs than investing in non-essentials.

Myanmar has a young and hardworking labour force, with 55% of consumers under the age of 29. As many schools were closed during the height of the country's political tensions, there is demand for

investment in education.

Meanwhile, basic infrastructure is limited. The majority of households do not have indoor plumbing and power outages are the norm. In addition, our research shows that ownership of desktop and laptop computers is 11% and 10% respectively – but at-home internet penetration is only 2%. Growth in this area will likely be limited, at least in the short-term.

**Ralf Matthaes is regional managing director of TNS Indochina and Myanmar**

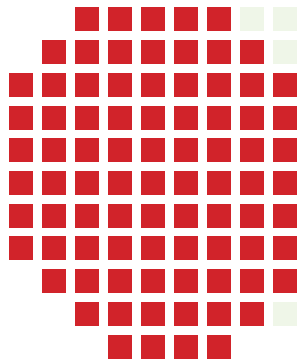
**“Demand for cheaper and more accessible food is high. In urban Myanmar, 38% of income is spent on food”**



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Why Facebook and BBM are becoming the marketing tools of choice in Nigeria and beyond. By Ashe Deleuil

## WEST AFRICA



# The real mobile revolution

In Western media, Africa is often treated as a homogenous entity – despite being comprised of 50 plus countries and more than 20,000 ethnic groups and languages. Media coverage also tends to focus on aid and humanitarian crises, or violence and political unrest. But there is so much more to this vast continent, one that is constantly evolving and progressing. And many of these developments are being propelled by an emerging, young, urban middle class.

Spend some time in the countries of West Africa and you will encounter a vibrant, fashion-forward and technology-obsessed generation; an educated, up-and-coming middle class who are connected with each other and with the world outside their cities by technology, and who are ambitious, driven and increasingly financially independent.

Technology is the clear enabler for this demographic and the emergence of the smartphone has empowered a whole generation. People we spoke to saw their mobiles as being integral parts of their everyday lives. They described their phones as an extension of themselves. Poor infrastructure means landlines are still out of reach for most, and with electricity supply often erratic, the smartphone has emerged as a viable PC/landline substitute. Unlike in the West, where communications

and technology have evolved in a dialectical fashion, in Africa the appearance of the mobile phone has been more like a revolution.

### Social supports

Mobile phones and social networking allow people to create their own support systems. In cities where physical infrastructure may be lacking, digital infrastructure can be a lifeline. Networking can be vital for getting work, starting trends or organising popular protest. Many people in Lagos told us stories of how central BlackBerry Messenger (BBM) was to the Occupy Nigeria movement.

Facebook and BBM in particular are used as a means to facilitate small businesses. They are vital entrepreneurial tools. One woman we spoke to, who was successfully growing a hair, beauty and accessory business, relies solely on Facebook and BBM to market her company.

Banking is still problematic for most people in West Africa, however, as is ownership of credit cards. As a result online shopping is underdeveloped. People are certainly

aware of e-commerce and can see the time- and cost-saving potential, but there are barriers to overcome – such as a fear of fraud and lengthy delivery times.

Phone banking is growing fast though, and if the success of M-Pesa, a money transfer and microfinancing service in East Africa, is anything to go by, it won't be long before it is fully established in West Africa.

While these developments go relatively unacknowledged in the West, the pace of change occurring in a relatively short space of time suggests that the social fabric of West Africa is being altered.

The new urban middle class are adopting technology and customising it to serve their own needs, and in doing so they are changing the way their societies operate. By the time this generation reaches maturity it could well have altered the way its countries are governed and how it deals with the outside world.

**Ashe Deleuil is research director at Electric:Electric**



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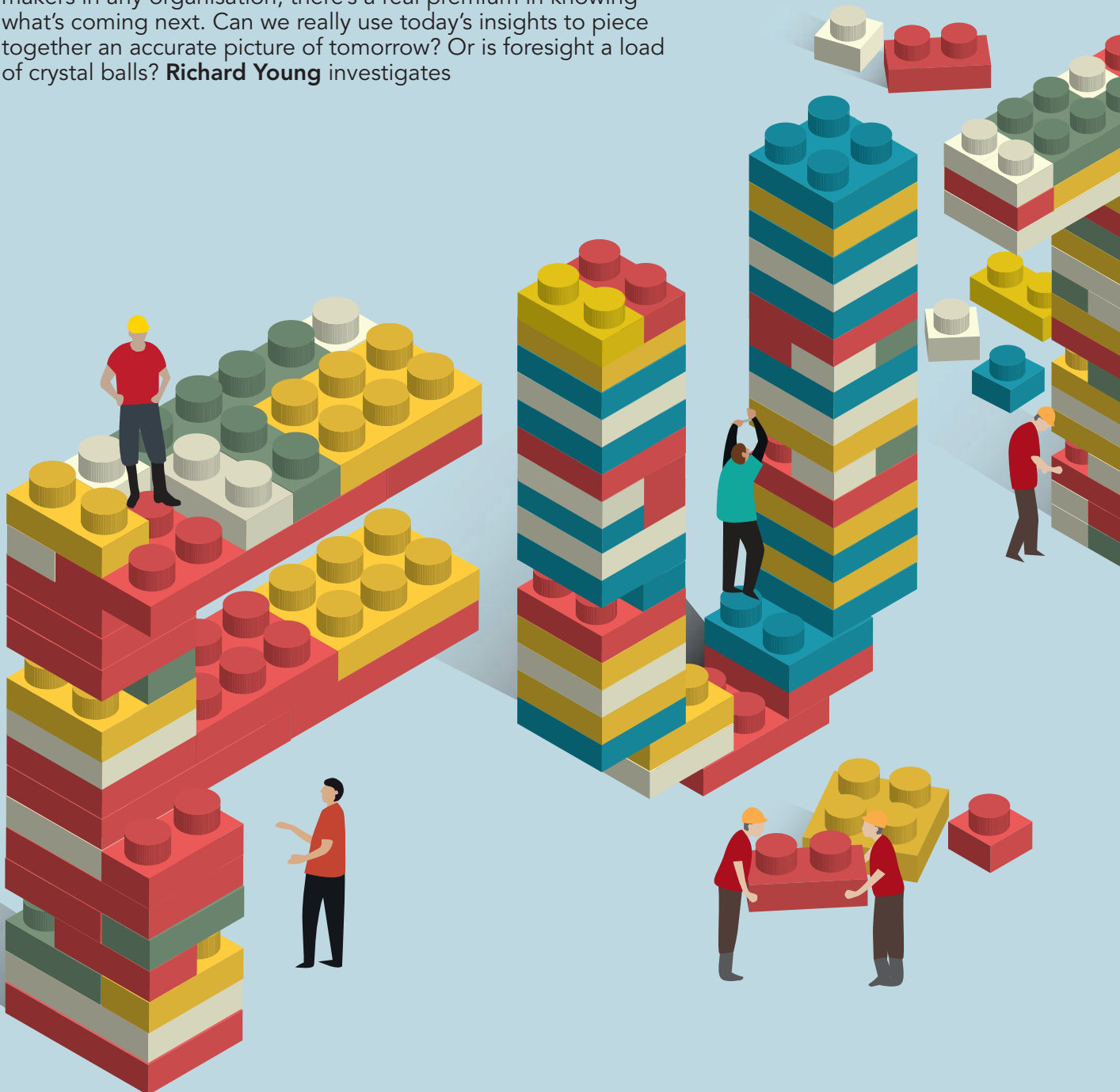
Face-to-face

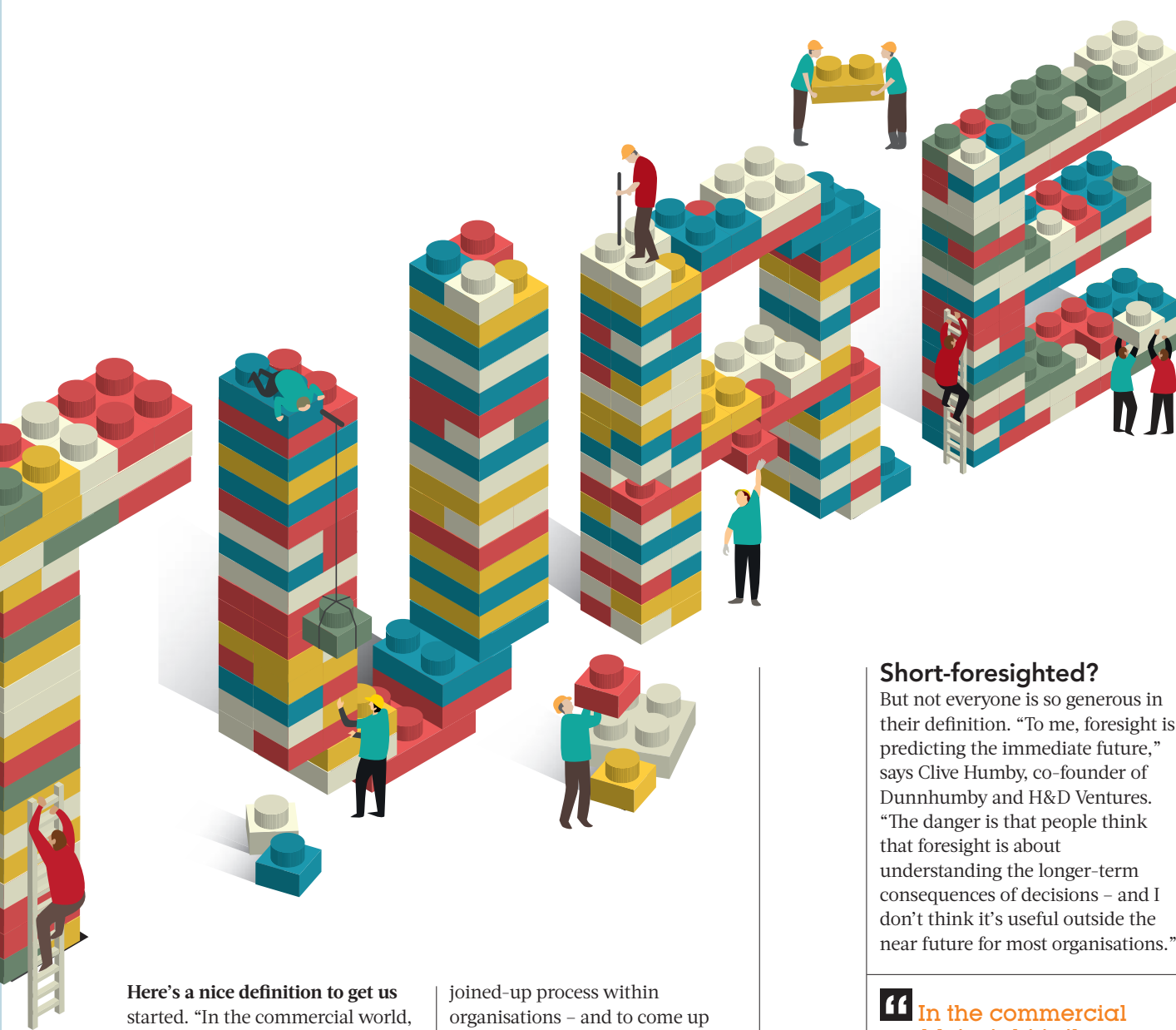
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# Building the

It's all very well knowing what's happening now. But for decision-makers in any organisation, there's a real premium in knowing what's coming next. Can we really use today's insights to piece together an accurate picture of tomorrow? Or is foresight a load of crystal balls? **Richard Young** investigates





**Here's a nice definition to get us started.** "In the commercial world, insight is the raw material you gather about today – and foresight is what you make of those insights, what causes you to make decisions about the future. It's compelling – and it ought to be ongoing and systemic."

It comes from David Smith, CEO of Global Futures and Foresight (GFF) – and he's had about 30 years to come up with a decent definition. But even he concedes that the term is tough to pin down. And, what's worse, foresight is rarely done well.

"There's certainly a value in seeing what's happening around us – and trying to work out what's happening next," Smith says. "The problem is that foresight is rarely a

joined-up process within organisations – and to come up with precise forecasts, you're relying on every component of your assumptions being right. Still, after three decades in the business, my own view is that it's better to be vaguely right than precisely wrong."

Roisin Donnelly, corporate marketing director and head of marketing at Procter & Gamble (P&G) in the UK and Ireland, goes a step further. For her, at the frontline, foresight "is the ability to anticipate shifts in trends, behaviours and preferences to inform and adapt our strategies as we move forward." Her business is all about the long game – brands to last the ages – so her version is necessarily much broader.

### Short-foresighted?

But not everyone is so generous in their definition. "To me, foresight is predicting the immediate future," says Clive Humby, co-founder of Dunnhumby and H&D Ventures. "The danger is that people think that foresight is about understanding the longer-term consequences of decisions – and I don't think it's useful outside the near future for most organisations."

**“ In the commercial world, insight is the raw material you gather about today – and foresight is what you make of those insights ”**

The 'sight' bit, he goes on, suggests quantification. "It says, 'We want to understand consequences in a measured way'. But exact future outcomes are just too complicated to work within that kind of modelling. So foresight is really just a prediction of a zone in which the future lies."

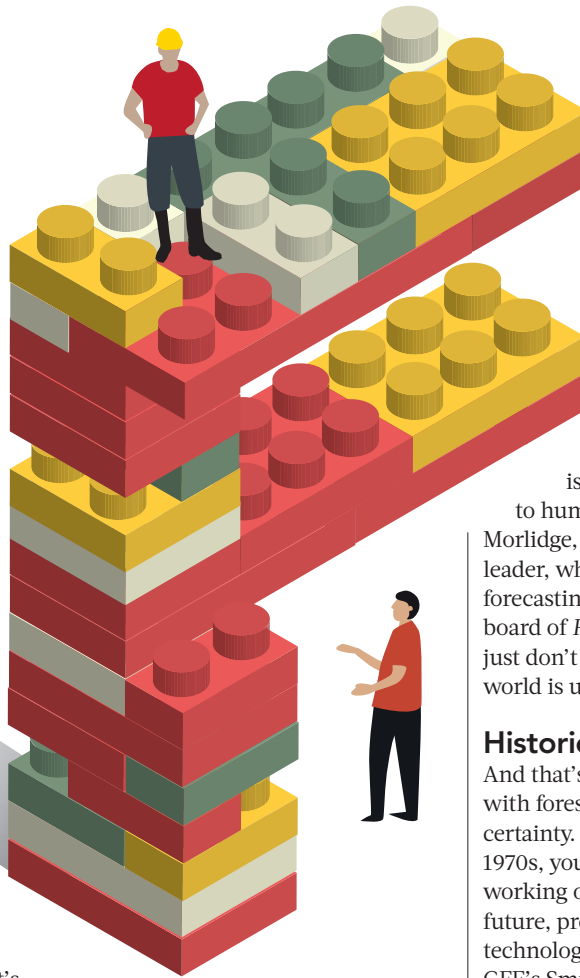
In any case, seeing the future is only half the battle. "It's something of a myth to say that large organisations get into trouble

thanks to 'unforeseen' trends or events," says Patrick Barwise, professor of management and marketing at London Business School. "I don't think that's often the case. For example, Kodak could see digital photography coming a long way off. Foresight wasn't the problem – it was how the company responded to it."

The two can come together. P&G's approach, for instance, is clearly rooted in action. "Foresight is not an end in itself but needs to be integrated into planning business strategies," says Donnelly. And it takes different forms – although they all feed through the company's Consumer and Market Knowledge Team into the board.

"In Beauty and Fragrance, it's important to understand fashion and lifestyle, so we work with a range of experts and scouts globally," she explains. "In Fabric and Home we are working with our suppliers and appliance manufacturers to create a total

Patrick Barwise is a London Business School professor



shoppers online and in stores."

But outside those clear and practical aims, our ability to use foresight is often clouded by basic insecurity. "The very idea that we might understand the future is fundamentally attractive to human beings," says Steve

Morlidge, former Unilever finance leader, who now specialises in forecasting and sits on the editorial board of *Foresight* magazine. "We just don't like the idea that the world is unpredictable."

### Historical foresight

And that's the nub of the problem with foresight. People want certainty. "Between the 1950s and 1970s, you had a lot of people working on macro views of the future, predicting big trends and technological developments," says GFF's Smith. "Futureshock, published by Alvin Toffler in 1970, is a good example. Sometimes the predictions about technology were right – but the social impact was misread, so the context for the impact of the technology was wrong."

experience to better meet consumer needs. Corporately, we are working with environmental experts to design more sustainable products. We are also working with our retailers to innovate for our

## FORESIGHT IN A NUTSHELL

**Based on the views of our expert panel, we've come up with some dos and don'ts for those keen to offer foresight.**

**DON'T** claim to be able to predict the future precisely. Even in simple or contained systems, there's too much that can go wrong.

**DO** offer ranges for any forecasts. They might still be wrong, but they force decision-makers to accept uncertainty.

**DO** offer evidence – data, insights and trends – that will help people understand today's context for decisions affecting tomorrow's outcomes.

**DON'T** get carried away with Black Swans and chaos theory. The concept of discontinuity is important, but the whole point of unknown unknowns is you can't see them coming.

**DO** help construct credible scenarios.

Evidence matters to decision-makers and they're more likely to spend time thinking about a future they think is believable.

**DON'T** allow foresight to take precedence over agility. It's better to react fast than see problems early.

**DON'T** get swept up by big data and high-level analytics. They're useful tools, but we still need human interpreters for their findings.



That post-war period has a lot to answer for. As well as developing a passion for gazing into the future, many thinkers wanted to nail down what we now know are fairly nebulous aspects of business.

“People who were trying to turn management into a science placed excessive faith in quantitative models about the world, and would rely on them for decision-making,” says Barwise. “But I’m not sure that’s really credible today. The financial crisis has reminded us why that’s dangerous. So really, we should be more cautious about modelling complex systems in pursuit of predictions.”

### Bound to be wrong?

As Morlidge points out, even the best statistical models demand the application of risk factors and confidence intervals. And that’s before you even get to the “unknown unknowns”. “The world’s trajectory isn’t smooth,” he says. “Discontinuities emerge and, in any system, small changes to the initial conditions can result in enormous changes in behaviour. They make the system unstable.”

That’s one reason Smith has turned away from one type of foresight entirely. Industry analysts’

predictions, he reckons, are bunk. “They’ll sell you lines that go up and lines that go down – all worked out very rigorously based on data and trends,” he says. “But everyone gets the same stuff – so there’s no comparative advantage. And there are no discontinuities. The real opportunities – and risks – are in the inflection points, which, by definition, aren’t going to emerge out of the historical data.”

“The idea that we might understand the future is attractive to human beings. We just don’t like the idea that the world is unpredictable”

The problem is that organisations are rarely confident enough to abandon these kinds of extrapolations. “It’s more rational to offer a range of potential outcomes,” says Bridget Rosewell, former chief economic adviser to the Greater London Authority and currently non-exec at Ulster Bank and Network Rail. “But that’s a more difficult process. You need a story for each potential outcome, and that’s demanding. That’s why it’s much easier to deliver a single number.” Easier – but almost certainly wrong.

### Start at the beginning

Setting unrealistic objectives for the outputs of foresight isn’t the only problem. The most basic is not having a strong foundation for your predictions. “Too many companies develop this vaguely positive view of their situation and just drift along,” explains Doug Ross, CEO of strategic consultancy Squarepeg International. ▶

Roisin Donnelly is corporate marketing director and head of marketing at Procter & Gamble in the UK and Ireland



### A note from our sponsor

Big data will change the market research industry – that we can be sure. But contrary to those who think this spells the death of MR agencies, we at e-Rewards believe that it will instead upgrade market research, making it more relevant for the customer and more real-time.

Agencies will have to learn and develop tools to manage this dynamic flow of information and to have the ability to crunch and analyse it to generate valuable insights.

In the last four years we have been evolving our business in order to get closer to consumers and all their digital touchpoints. Our recent partnership with Experian Marketing Services and the acquisition of mobile research specialist IPinion and social research expert Conversion, will help us to achieve this. We are moving strongly to be an enabler for collecting permission-based digital data.

By combining our quality panel solutions with strong data sources (both internal and external) and adding analysis and visualisation capabilities, we believe that we are in a strong position to develop a single view of the customer. This will be priceless for companies who will be able to understand their customers much better and to create highly specific segmentations and to tailor products and services precisely to meet those needs.

To summarise, we are on a quest to understand consumers much better and how that behaviour changes hourly, not monthly.

Asaf Levy is vice-president of innovation strategy at e-Rewards, parent company of Research Now



“So the first stage in addressing the future is to get a fix on the truth now. That’s why we like working with market researchers. They’re experts at uncovering this kind of truth – multiple truths, in fact. But leaders often don’t want to know, so these implications languish in the ‘nice to know’ category and aren’t acted upon.”

Result? Poor initial assumptions deliver projections that are plain wrong. However, being wrong is not always a disaster – if you accept from the start that it’s likely you will be.

“Part of being a venture capitalist [VC] is knowing that there are simply too many factors at work to have any degree of confidence in any one outcome,” says Alex van Someren, managing partner at Amadeus Capital’s seed investment funds. His job is spotting and backing tech start-ups. Predicting the future – or rather, “futures” – is his meat and drink. “That’s why we



use portfolio theory for investments. We want a range of potentially disruptive technologies, different markets, diverse teams – combinations of all three. If you get the right mixture, you defray the risks collectively; you’re looking for one or two to be so successful that you can continue to back the right mix.”

But while portfolio theory works fine for VCs, other disciplines aren’t so lucky. Where a range of inputs has a single output – a sales figure, say, or a net promoter score – rather than multiple, if aggregated, outcomes, it gets tougher.

### Step 1: admit you have a problem

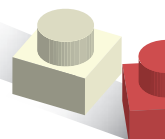
So take a leaf out of van Someren’s book and admit you’re probably wrong. “On the economy, the record of predicting what will happen is pretty poor,” says Paul Ormerod, one of the founders of the Henley Centre for Forecasting and author of books including *Why Things Fail*. “The problem is that you can hardly ever predict the key turning points. The reason? Unlike,

say, engineering or physics, the data you’re looking at is driven by so many factors that at the aggregation level, it’s much harder to sift out the noise – your statistical model is bound to be incomplete.”

Add in discontinuities and innovations, and you can see why so many professional forecasters treat foresights with caution. But for many (less technical) decision-makers, even those obvious factors won’t convince them not to rely on forecasts.

Worse, they often retrofit unexpected discontinuities onto their existing worldview. “After the event, they often seem quite obvious,” says Morlidge. “So people start to think they can predict discontinuities. And, if enough people are predicting outcomes, after a major discontinuity some will look like they were right before the event. But that doesn’t mean they were necessarily supernaturally perceptive. Quite often, they were just lucky.”

Morlidge thinks organisations should concentrate on measuring forecast accuracy to beat this tendency. Meanwhile, layering in more rigour to forecasting itself can simply compound the problem.



## TWITTER PREDICTS

Social media buzz has become a crucial part of the marcomms mix. Twitter and Facebook monitoring can give brands real insights into consumer sentiment and alert them to service problems or PR trouble building up.

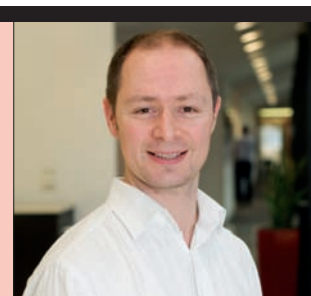
But can that buzz be converted into foresight? Sitaram Asur and Bernardo Huberman, researchers at HP Labs, wrote a paper in 2010 claiming it can. They used Twitter to accurately predict box-office revenues for movies. But it’s not all plain sailing. Despite the academic rigour of the early studies, later experiments have proved less conclusive. A Princeton study in 2012 (*Why*

*Watching Movie Tweets Won’t Tell the Whole Story*), for example, pointed out that Twitter users were too unusual to be a barometer for movie takings. They tended to be too positive.

In the financial markets – where foresight has long been sought from almost mystical number crunching techniques such as chart analysis – Twitter prediction has garnered more attention. In 2010 Johan Bollen at Indiana University and his team produced an algorithm to analyse Twitter mood states that proved 87.6% accurate at forecasting the movement of a stock index over one day.

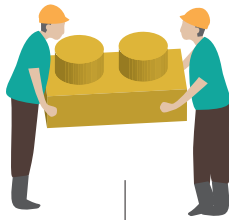
Sounds great. “But the problem is that even if these kinds of predictions work for a brief period, if everyone starts to use the algorithms to direct their decision-making – making trades, for example – then the prediction itself becomes skewed,” says Harvard PR digital lead Lance Concannon.

That didn’t stop Derwent Capital Markets (DCM) from launching a £25m hedge fund trading on predictions from Bollen’s Twitter algorithms. Announced in late 2010, it didn’t begin trading until the summer of 2011 – and then was closed after just one month, claiming a return of 1.85% against average hedge fund gains of 0.76%. Boss Paul Hawtin saw more potential in



Lance Concannon is digital lead for Harvard PR

selling apps and sentiment analysis to third parties. But then in February 2013, he put the entire business up for sale – and DCM’s own website says the final bid for the company was just £120,000.



“The risk of developing ever more disciplined approaches to foresight is that it can lead you into believing your own forecasts,” says GFF’s David Smith. “It’s better to have as wide as possible a network of disparate contributors fuelling the process of looking forward. For example, P&G built a network of millions of people, from design school students to retired employees, to advise them. They looked outside the business to get a better picture of how the product set might look in the future.”

Narrowing your scope can also help. “If you know, say, three or four factors within your own control, you can start to get more confidence over, maybe, a year,” says Ormerod. “You still have to factor in externalities, such as the

decisions of competitors. If you have a decent understanding of that – perhaps using game theory or psychology – you should be able to come up with a decent short-term forecast.”

### Complexity kills

But longer-term? Better foresight might be the wrong talent to develop. “The key trait organisations need to develop is adaptiveness,” argues Barwise. “Take the Black Swan theory – the emergence of unknown unknowns. Nassim Nicholas Taleb, who popularised the theory, was working in financial markets. One of the transferable lessons from his work is that the over-quantification of complex systems is often what causes the real problems.”

In addition, decisions made on the basis of any prediction actually shift the underlying assumptions for that same forecast. “It’s incredibly easy to have certainty in what’s going to happen if there’s no innovation,” explains Bridget Rosewell. “Economic growth is contingent on it – even though most economic models don’t have any innovation built into them at all. But if you’re going to thrive over the long term, you need to expect, and be able to cope with, change.”

It’s a moving target, then. And it gets worse. “A key point people miss is that complex doesn’t always mean complicated,” says Ormerod. “You can have a very simple system where foresight is hard to deliver because of social interactions. As social influence becomes more important in every market, thanks to communication tools and greater transparency, there’s a need to look at other disciplines.”

Behavioural economics is another question altogether, of course. But before we touch on the psychological aspects affecting foresight, what about the hard facts?

### Data and deception

The traditional methods for predicting the future are almost all based around data. Extrapolation is a field of expertise in its own right. But over the past few years, two new factors have come into play: complex analytical tools; and the technology to interrogate big datasets. The problem is, neither necessarily offers much foresight.

“There’s a lot of discussion about big data and its power to create new insights into markets and customers,” Barwise says. “The

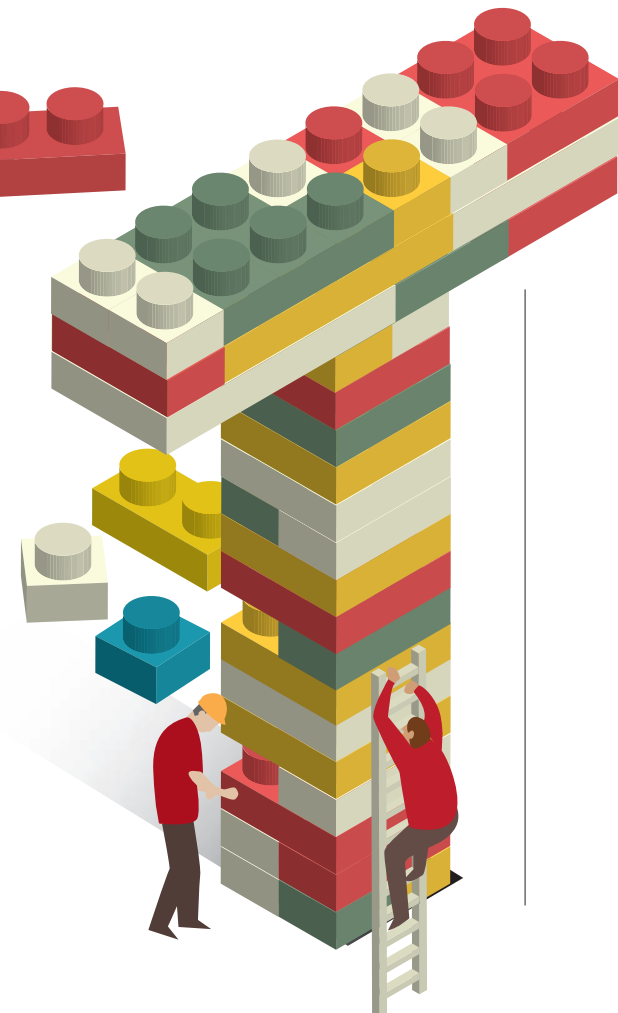
“If enough people are predicting outcomes, some will be right. Quite often, they are just lucky – not supernaturally perceptive”

reality is that what really makes a difference is a lot of small, incremental benefits that accumulate. And having lots of data about customer behaviour creates a relentless pressure to examine what’s happening, which makes it harder to step back.”

One man who should know all about that is Clive Humby, of course – father of the Tesco Clubcard. He argues that big data doesn’t just distract from attempts to see the strategic picture – it can fundamentally disguise it.

“When you have that much information, it’s always possible to construct a story that supports your hypothesis by cutting the data in the way you need to,” he says. “That’s one of the good things about traditional market research. The samples are usually small enough to tell relatively few stories – but they’re all credible. When you have millions of consumer records, any story can emerge.”

Steve Morlidge agrees. “It doesn’t help you cope with the big stuff, the strategy and the business





tactics,” he says. “That’s why I’m also nervous about this term ‘actionable insight’. If you can act on it immediately, almost by definition it’s trivial or short term. A better question, for insight and for foresight, is ‘Is it useful?’.”

That’s something P&G’s Roisin Donnelly would endorse. She stresses the importance of the human touch. “We have more data, generated faster, than ever before,” she says. “But when you’re dealing with the future, you’re always making judgments – based on different data sources, yes, but combined with experience of the past and intuition.”

That need for nuance applies whether you’re planning tomorrow’s BOGOF offer or considering consumer behaviour in 2018. And that’s why Humby sees one of his greatest achievements as using data to dispel the notion of the “average” shopper.

“Foresight is about understanding the different groups you serve and gaining some visibility into the

consequences of your decisions on them,” says Humby. “It’s not a mechanical measurement of events designed to direct decisions.”

That softer view of data also helps organisations to react early to trends they’re seeing. “For example, we saw increasing numbers of ‘shopping for tonight’ type baskets in Clubcard data. That led to the development of the Tesco Express format. But bear in mind: once you respond to that emerging trend with a product, you also accelerate it. It changed the way people shopped as much as it met their needs.”

### Motivating actions

So the secret to foresight is properly laid out, realistic objectives. “It offers real value in two areas,” Barwise says. “First, in setting ambitions – not silly ones, but neither should it just be business-as-usual with a few incremental improvements.” Second, organisations should be taken outside of their comfort zones, he says. “That means being open minded – listening to the dissidents inside your

business and your customers; and questioning your industry’s models, looking for ways to streamline things or offer radical improvements.” Innovation is risky in the short term, of course; but not innovating is risky in the long term, if you’re exposed to structural change.

To Morlidge, foresight serves as a form of preparation. “There are two very important ways it can help,” he says. “First, what happens if there’s a disequilibrium – how might the system change? And second, how will we deal with discontinuities?”

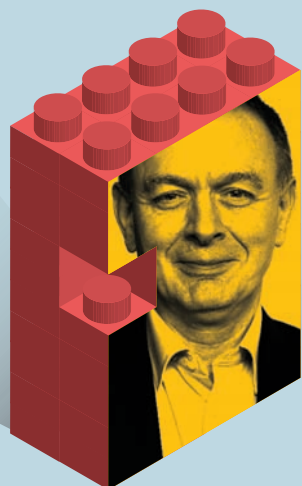
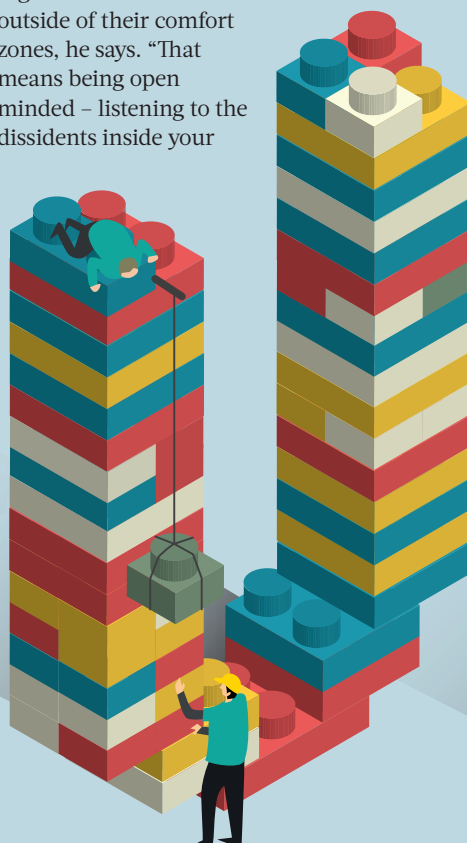
“The first is all about predicting within confidence limits what might happen. But the limits are pretty narrow. The second requires organisations and decision-makers to engage in a bit of scenario planning. The mere act of thinking about a possible outcome both helps you identify it when it starts to happen; and makes it more likely you’ll act when it does.”

When thinking about the future (or futures), Alex van Someren says it is important to draw on a range of perspectives. “There’s no one place we go to seek information or even one type of data we’re looking for,” he says. “The market is changing all the time, so we need to find new places to look and engage; new reference points.”

Squarepeg’s Doug Ross adds

Paul Ormerod (bottom left) is an economist

Alex van Someren (bottom right) is a venture capitalist





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that for foresight to be taken seriously at the highest levels, the company board has to adopt the same willingness to take a different view. “Sometimes the answers that come from foresight are common sense – but sometimes they’re not what leaders want to hear,” he says.

“That’s why market research ought to be at the board table – and why it needs to be more integrated with the business. Because it’s not just data or statistics or trends or even behavioural intelligence that sell it – it’s the stories that blend all of those together in ways that are relevant to the business.”

## Budgeting the budget

Paradoxically, the foresight that’s most relied upon – and forms the foundation for most organisational decision-making – is the one with perhaps the weakest connection to reality: budgeting. It’s still incredibly rare to find a finance function that doesn’t assemble a corporate plan and go through an annual budgeting round to allocate resources and set targets.

“Financial forecasting is usually terrible,” admits Morlidge. “If the company finance function’s forecasts are treated with any reverence, it’s not because they’re any good – it’s because they’re important. Basically, if you screw it up, you could lose your job.” (Morlidge adds, betraying his own accountancy roots, that the only thing worse than a financial forecast is a sales forecast.)

Of course, sometimes the forecast is right. Glance through the City news pages and you’ll see plenty of examples where a company’s profit forecast came in bang on. The thing is, says Morlidge, in many cases that might be a problem.

“If it does seem to be right, it’s often because people are steering to the forecasts – they’re attempting to make them true,” he says. “The problem is budgets. People routinely take action to make the

future like the budget they created.”

Either that, or they game the process from the outset. “Too often, when managers see uncertainty ahead, they build in cushions to the budgeting process – whether that’s soft targets or cash hidden away – so the whole discussion is removed



from the truth,” says Ross.

“The best organisations address that by taking a different approach, such as a quarterly rolling forecast looking three years out. If you want some foresight into the business, it’s not a good idea to gather all the numbers in one big bang every year and wrap it into the process for allocating resources the next year.”

So why does it persist? Simply put, most people fear the future.

They have long lead times in key parts of their supply chain, and setting budgets and making forecasts helps them feel better about managing those future commitments.

“Then there’s a ritualistic component to it,” Morlidge adds. “The famous systems thinker Russell Ackoff used to say it’s like a rain dance. People wanted him to come in to ‘help change the

weather’ – the way they ran the business. But more often than not, what they were really looking for was a better rain dance. Forecasting and budgeting are psychological responses to uncertainty – they’re a corporate ritual.”

## Creating scenarios

If formal budgeting and forecasting are too rigid to be valuable foresight, what’s left? According to many of our

commentators, the real value is in scenarios.

“Scenario planning is much more compelling,” says

Barwise. “By asking the ‘supposing...?’ questions, you encourage decision-makers to be more alert to change and more agile.”

The best scenarios must be plausible and have some degree of granularity, he explains. “Managers are both rational and emotional. You need to work with both of those traits if you’re to ensure that insights are translated into actions. Market research has tended to focus on the rational side, to place a huge value on having reliable data. But to fuel the emotional side, techniques like scenarios, ethnography and video interviews are all very powerful.”

That takes us back to the power of stories. “At the GLA, there’s a

London Plan – a 20-year framework for development,” says Bridget Rosewell. “Some people would look sector by sector and try to create a bottom-up forecast of how employment patterns might change. I think that’s nonsense.

“Having done long-range forecasting for ten years – and been broadly right, though precisely

“**Sometimes the answers that come from foresight are common sense – but sometimes they’re not what leaders want to hear**”

wrong – I think it’s more valuable to create simple stories than hard statistics. If you construct them at a level of data aggregation that’s manageable, you can get some insight into the future.”

The good news is that evidence matters in these stories. “We’re very sensitive to the plausibility of a story,” says Morlidge. “It’s the key to helping people act decisively in complex environments.”

So how does all this come together in scenarios? “First, you look at the factors affecting your business today that are relatively predictable,” says Ross. “Second, ask yourself, ‘Over three years what are the unpredictables that might affect us, the things that are outside our control?’

“The problem is that quite a lot of predictable things are never properly tackled,” he continues. “We worked with one business where the senior workforce was getting older. We could see a retirement bubble was building up, you could even identify when it would burst. But nothing had been done. So don’t even worry about the unpredictables until you get those kinds of issues sorted out.”

Rosewell also stresses that you need to be clear in your

assumptions and in the kind of data or modelling that underpin the scenario. That way, if the user disagrees, they’re forced to ask, “Why do I think these assumptions are wrong?”. But they can never simply discard the vision you’re laying out.

### Prepare for change – don’t forecast it

Ultimately, this all boils down to insights that force decision-makers to confront the fact that things change.

“That’s not to be fatalist about it,” says Barwise. “The premium here is on preparing for the future, not predicting it. That’s why insight has a big role, particularly in helping organisations become more open to the outside world and to market signals. It’s particularly valuable in highlighting signals that decision-makers don’t want to hear – and in making them more open to both evidence and options being generated internally. Ultimately, insights only have a value if they’re acted on.”

That’s certainly true of the work Nicola Millard is involved with at BT (see box, right). Her fear is that by accusing foresight of being precisely wrong, organisations

Bridget Rosewell is an economist



## FUTUROLOGY IN ACTION



Nicola Millard is the customer experience futurologist for BT Global Services. She not only has to gaze into the

future – her predictions inform the corporate response to it, too.

### Is it worth predicting the future?

NM: Foresight within a five year boundary is probably worth doing – that’s the kind of timescale where you might be able to predict things with a reasonable level of reliability. Once you start trying to look 20 years ahead, say, things get much harder.

### Does foresight need to be driven by today’s insights?

NM: I like the more rigorous academic side, with cold hard facts in my possession – as well as some of the more speculative stuff. My own approach is to observe heavily in an attempt to see consumer behaviour, then extrapolate.

### Does that include market research techniques?

NM: Foresight brings together all sorts of methodologies. I do the people bit – and ethnography and consumer research play a huge part. That gives me data that we can apply to technologies, then operationalise it and make it real.

We use hot-housing techniques – splitting people into teams and having them work together, but in isolation from other distractions. We have ground rules – they have to share information between teams, for example – and a group of senior managers acts as a judging panel to decide which team delivers the best approach to dealing with the problem we’ve set. The winning team then gets to take the idea forward as a bounded experiment.

Our experiments have clear success criteria and a time-scale. We’re aiming to learn quite specific things about what’s going to work – and a properly bounded experiment can teach you plenty, even if it is a failure.

### So it’s pretty rigorous.

NM: Senior managers tend to be data driven, which is why it’s so valuable to experiment and to have a well-reasoned case for your predictions.

stop trying. "It's a bit depressing when you hear companies complain that they can't afford to do foresight," she says. "I think they can't afford not to."

"And it's not as if it demands massive resources. All you need is people confident and open-minded enough to conceive of experiments and give them a try. Technology is empowering that. Cloud services, for example, mean that any business that thinks it's spotted a trend or data that's suggesting a shift in consumer behaviour can try out a new approach without ploughing in massive investment."

The other way of looking at it? "It's better to shorten your lead times than to get better at forecasting," says Morlidge. "Do you develop faster reflexes? Or do you develop more confidence



in your assumptions about the future?" Given the explicitly unpredictable nature of the future, he thinks it's a no brainer – even while he stresses that failure to spend at least some time

weighing up the future is equally foolhardy.

And if you're looking to influence decision-making, Bridget Rosewell has a simple message. "The problem is that a lot of market research doesn't come to any conclusions," she says. "It has to turn those tables into something people can use to make a judgement. The clarity of the assumptions is there – but it needs that narrative. And the thing about pontification is that credibility often comes from the confidence in making it – even if it's consistently wrong." ■

Doug Ross (top) is a business consultant



Clive Humby (centre) is a data expert



Steve Morlidge (bottom) advises on forecasting



## BEST AND WORST PREDICTIONS

### Told you so!

**Foresight:** "It will soon be possible for a businessman in New York to dictate instructions and have them appear in type in London or elsewhere." Nikola Tesla's vision in 1909 was informed both by his scientific genius – and his understanding of human needs.

**Reality:** Tesla's "inexpensive instrument no bigger than a watch" seems uncannily close to smartphones and email.

**Foresight:** "Personal computers are available in a wide range of sizes and shapes, and are commonly embedded in clothing and jewellery such as wristwatches... high-resolution visual interfaces range... up to the size of a thin book." Futurist Ray Kurzweil looked at 1999's beige boxes and saw a better way.

**Reality:** Yep, we had smartphones, tablets and e-readers by 2009. Google Glass promises to add that wearable factor soon.

**Foresight:** "Ready-cooked meals will be bought from establishments similar to our bakeries of today." US civil engineer John Elfreth Watkins made this bold consumer food forecast in 1900.

**Reality:** The global market for ready meals will be \$81bn by 2015, according to Global Industry Analysts. Horsemeat permitting.

### Did I say that?

**Foresight:** "There is no reason anyone would want a computer in their home." Ken Olsen, founder of DEC, said this in 1977 – when the home computer was already a reality.

**Reality:** A quarter of homes

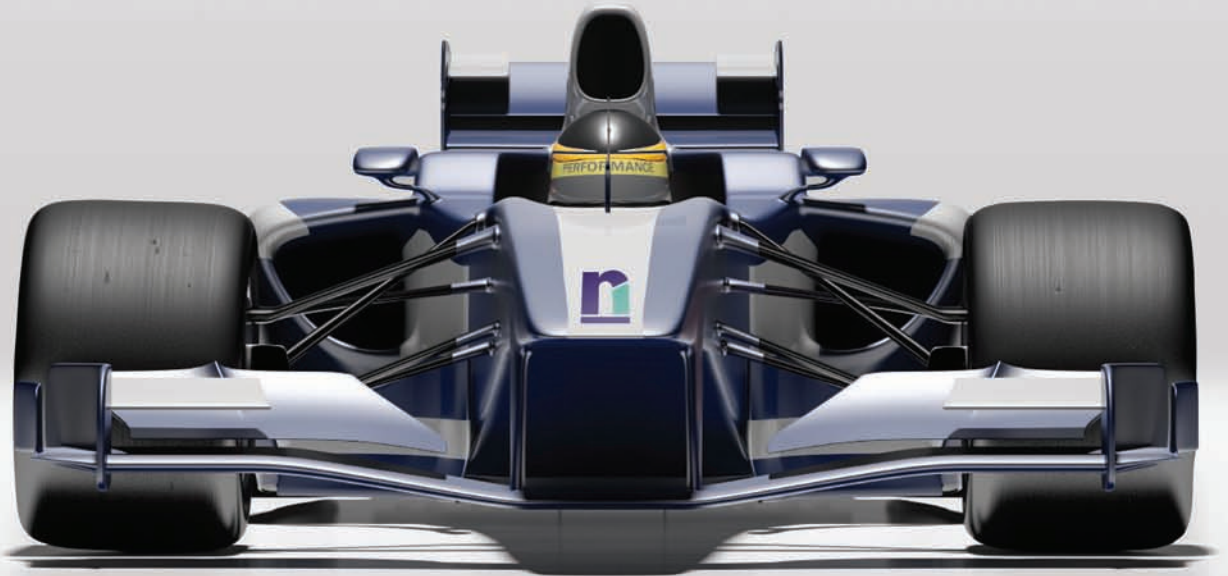
globally now have wi-fi, let alone some kind of computer.

**Foresight:** "I see no good reasons why the views given in this volume should shock the religious sensibilities of anyone." Charles Darwin's view of *On the Origin of Species*, published in 1859.

**Reality:** Modern creationists still vilify Darwin. A 2009 reprint sent to US schools had a 50-page argument in favour of intelligent design.

**Foresight:** "Who the hell wants to hear actors talk?" HM Warner, one of the Warner Brothers of studio fame, poo-pooed the talkies in 1927.

**Reality:** Despite *The Artist* – a silent film – winning five Oscars in 2012, it's safe to say people want to hear their movies. Whether they want 3D is open to question...



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# The shock of the

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## Life in a glass box

### Trust and transparency

dominated the opening keynote debate, chaired by *BBC Radio 4's Today* presenter Justin Webb. With the rise in available information sources, there has been a corresponding fall in the degree of trust in authority figures and brands. But according to Patrick Barwise, emeritus professor of management and marketing at London Business School, the decline in trust is not universal.

Some brands and institutions – such as retailers – have remained highly trusted, as are academics and doctors. “It’s not the case that no-one is trusted,” said Barwise, “but it is the case that marketers want more of it.” As in marriage, Barwise said, the only way to build



Discussion guide... *Today* presenter Justin Webb

trust in business is to keep your promises. When you don’t, social media allows your failings to be quickly shared with the world.

“What institutions need to realise is that they have to start operating as if they were in a glass box,” said Matthew Taylor, the chief executive of the Royal Society of Arts. “They still believe that the problem is to find cleverer ways to hide the fact that their private interests don’t relate to the public interest.”

Organisations feel self-pity, Taylor said. They feel the public doesn’t understand them and that’s why they can’t be honest about their intentions; that they have to manipulate their image. They say they’d like to do the right thing but it would impact their profitability

and shareholders would punish senior managers. “But organisations have to start wearing their dilemmas on their sleeves,” said Taylor. “If the conversation you are having [internally] is not a conversation the public would approve of, you will be in trouble.”

Camilla Harrison, chief operating officer of M&C Saatchi agreed with Taylor. She said: “The train has left the station on transparency. If brands aren’t transparent they will be treated with suspicion.” And if you’re going to be transparent, you have to be simple as well, said Harrison. “If you confuse people, that’s just another way of being opaque.”

# new – in review

## Going for gold



Big things in store...  
PepsiCo's Erkan Balkan

## Wanted: Behavioural economics at scale

### PepsiCo Turkey's consumer insights manager

Erkan Balkan flew in to London to share his enthusiasm for behavioural economics – and his hope that it will soon play a bigger role in the market research process.

Balkan explained how he learnt early on the fallibility of attitudinal data in predicting behaviour. Nine years ago, while working at Millward Brown, Balkan was testing an ad for a drinks brand. The results were perfect, he said, but something didn't feel right. He, personally, didn't feel like the ad was connecting.

Ultimately, the ad failed.

Now at PepsiCo, he's pushing awareness of the insight potential of behavioural economics. However, despite his own personal enthusiasm, he said work inspired by behavioural economics accounts for less than 5% of his budget.

The problem? "There are no scalable solutions available for behavioural economics – at least not in Turkey." Where it is used, Balkan said, it usually comes in at the beginning or the end of a project, either to frame the problem or to help understand the results.

Most of the big market research companies have project teams looking at behavioural economics – experimenting with it at a very small scale, but not applying it to real business problems just yet. Balkan acknowledged that there are some small companies who are trying to apply these tools, but scale is needed.

### Tips on winning from an Olympic champion

The key to success is working to create small margins of difference, according to gold medal-winning Olympian Katherine Grainger.

Grainger took conference delegates through her rowing story, starting at Edinburgh University, where she initially failed to get into the four boats available and was placed in what

she called a "remedial boat... All athletes are about extreme insecurity and ego and it was a massive sledgehammer blow to me," she said.

But after four years of hard work she was eventually awarded the university's Eva Bailey Trophy – given to the most outstanding female athlete. "I finally got it right," she said.

Three years later she

won silver medal at the 2000 Sydney Olympic games, and again in Athens and Beijing in 2004 and 2008. Last year, of course, she took gold at London 2012.

But even now, at the top of her game, she says there is still work to be done. During her talk she showed a video compiled after the Athens games, which explained that the difference between five gold medal wins for the GB team and silver placings was an aggregate 0.545 seconds.

"Checking every detail to achieve that small margin [is what] makes you the best," Grainger said. "You look at the tiny margins which can make the difference. In every single area you can make an improvement, even if it is minute. But together these add up to a massive difference."



A winning performance...  
Katherine Grainger

# Creating stories out of data

**The Guardian's Simon Rogers on the importance of starting small – no matter how big your dataset**

"I have one of those jobs where my parents don't fully understand what I do," said Simon Rogers, editor of *The Guardian's Datablog*. Allow us to explain: Rogers is what you might call a data journalist. He creates stories out of data: whether that means writing about data or producing data visualisations.

Playing around with numbers has "always been seen as a slightly odd, wonkish thing for a journalist to do," said Rogers. However data journalism has exploded in popularity, thanks to the huge volume of data now being created, and the number of tools available to help non-specialists do reasonably sophisticated things with that data.

In volume terms, Rogers said: "A lot of the stuff we deal with is quite small data." The Wikileaks logs might have run to some 400,000 items – but that's not really big data, he said. "It seems enormous. But there are people out there who deal with millions of rows of data."

Whatever the size of your dataset, Rogers said that in order to reveal the story within, it's always best to start by trying to make the data you're working with smaller.

But in picking what story to tell, Rogers said, you can't guard against bias. "I don't believe in an objective truth," he said. As a news editor he gets a lot of information thrown at him on a daily basis. "So you have to filter stuff out based on what's interesting to you."



Lisa Edgar's work on age has implications for advertisers

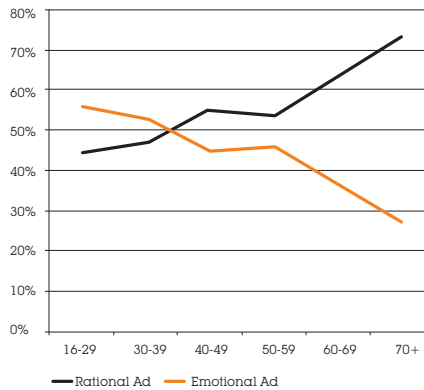
# Growing up, not welling up

**New research suggests older people are less responsive to the emotional qualities of advertising**

It's often said that as we get older, we get wiser. But do we become more or less emotionally-driven? And does this affect how we respond to advertising? Stanford psychologist Laura Carstensen developed the Socioemotional Selectivity Theory, which suggests that as people age, they invest greater resources in emotionally meaningful goals and activities.

"If that extends to advertising – as some have hypothesised – there should be a lot of value in that," said Lisa Edgar, founder of The Big Window. "It might affect how we structure marketing plans or load messages, for example." Edgar wanted to put the hypothesis to the test. She teamed up with Jo Kenrick, marketing director of Homebase to run an experiment involving Nectar loyalty scheme members.

The Homebase creative team designed three pairs of press-style ads. Each pair had both an emotional variant and a rational one.



Consumers were then briefly shown all of the ads from each of the three pairs in rotation and were asked to describe what they saw. Edgar then analysed the words used to describe the ads

She and Kenrick discovered that the emotional ads were much more likely than the rational ads to engage the sample as a whole. But there were differences by

age. "While recall of rational items (like pieces of furniture, colours etc.) varied around the mean, irrespective of age," Edgar said, "older respondents were much less likely to describe and engage with the emotional ads in an emotional way." In addition, when asked to say which of the ads they preferred, older people were much more likely to vote for the rational variant (see graph).

The results have big implications for Carstensen's theory. But it also holds important lessons for advertisers. "As people age, it seems they are making an effort to respond to advertising in a rational way. They seem to be trying to control their emotions," said Edgar. "They still recognise emotional ads; they just aren't as responsive to the emotional qualities of them. They want to feel reassured that what is being sold to them is what they are going to get."



# Sounds and science

**The majority of communications budgets are spent on visuals – but what about appealing to the rest of our senses?** Scott King and Russ Jones of the ‘sonic branding agency’ Condiment Junkie, explained how sounds can affect our perception of taste, colour, etc. “You can enhance brand properties through sensory design,” they said. The atmospherics of an environment can combine to make an experience that fires emotions, thus making it more memorable.

By way of example, Condiment Junkie revealed how they worked with Heston Blumenthal’s Fat

Duck restaurant to try to associate sounds with flavours. They also worked on the creation of the Sounds of the Sea, the restaurant’s signature dish, where scallops and tapioca ‘sand’ are served with an iPod playing a recording of the ambient sounds of the seashore.



Paul Edwards, with MRS chief executive Jane Frost

Music and sound are particularly good at stimulating emotion, so music can be used to enhance the emotion that people feel about a brand, said Hall & Partners Europe CEO Paul Edwards, and Adam & Eve DDB’s scientist-in-residence Daniel Mullensiefen.

They talked delegates through a test of two Volkswagen TV ads – one with music, one without. Using both implicit and explicit response testing, they found no difference in the explicit responses to either ad, both pre- and post-exposure. But implicit response was up – and even more so with music.

“Music plays a role beyond that of gaining attention,” said Mullensiefen. “It helps drive emotions which drive brand choice. But that’s not evident using the explicit measurement.”



The eye of the beholder... City University’s Jo Wood

## Beauty versus utility

“Information is beautiful, but beauty is not enough.” So said Jo Wood, professor of visual analytics at City University, speaking on day one of MRS Annual Conference.

Wood took us through his London Bicycle Hire project – featured in Research-live.com’s recent data visualisation supplement ([bit.ly/16dbsuc](http://bit.ly/16dbsuc)) – which mapped the 20m journeys people have made between the 600 different bike hire locations in the city.

The result is a stunning motion graphic; however, Wood was at pains to point out that “there is a difference between impactful visualisation and useful analytical visualisations”.



### Inland Waterways Visit Survey

In a fast-paced world, the Canal & River Trust’s historic canals and rivers provide a local haven for people and nature. The Canal & River Trust monitor the public’s use of and attitudes towards canals and rivers through the Inland Waterways Visit Survey (IWVS) - a continuous telephone survey interviewing just under 1,000 people each month, established in 2003.

We would like to develop this survey as it moves into its next decade. We are seeking an agency that has a strong track-record of working in the heritage, recreation and charity sectors and that can demonstrate their expertise in managing a participation study on this scale.

If you are interested in tendering for the IWVS please email [john.brown@canalrivertrust.org.uk](mailto:john.brown@canalrivertrust.org.uk) for further information and an Invitation To Tender (ITT).

**The deadline for submitting the ITT is 12:00 on the 10th June 2013.**

[canalrivertrust.org.uk](http://canalrivertrust.org.uk)

# Byte-sized stories

Ebooks are shaking up the publishing industry as MP3s did for music. Former EMI insight chief David Boyle tells **Lucy Fisher** how he's helping HarperCollins get to grips with digital consumers



## CV

### DAVID BOYLE

#### Feb 2013 – present

Senior vice-president of insight, HarperCollins

#### 2009 – 2013

Senior vice-president of insight, EMI, and director of insight, Zeebox

#### 2008 – 2009

Group development manager, Dixons Retail

#### 2007 – 2008

Head of forecasting and ordering deployment, Tesco

#### 2005 – 2007

Analyst, Catalyst

#### 2003 – 2005

Senior analyst, New Philanthropy Capital and policy and data analyst, Labour Party

#### 2000 – 2003

Associate consultant, LEK Consulting

He's only weeks into his new role as senior vice-president of insight at HarperCollins, the book publishing arm of Rupert Murdoch's News Corp empire, but already David Boyle is thinking big. He's hard at work building an online dashboard where people from around the business can go to explore data about the distinct types of readers that make up HarperCollins' customer base.

"It's about the books market widely but it's also about implications for individual authors," Boyle says. "We've picked 15 authors – a mix of household names and new and upcoming talent – and we're tackling lots of issues at the same time. We're thinking about the big issues around products and pricing."

Pricing in particular has been something of a headache for HarperCollins in the recent past. It was one of five publishers accused last year of colluding with Apple in an ebook price-fixing conspiracy designed to limit Amazon's market dominance. The charges were settled before going to court, and Amazon – along with its Kindle e-reader – remains a major threat to traditional book businesses, many of which are bulking up in a wave of consolidation.

## Digital revolution

The price-fixing débâcle was before Boyle's time and, perhaps unsurprisingly, he won't be drawn on it. What he is interested in is developing an understanding of how ebooks are changing reading behaviours and book-buying habits, and how publishers can work out who's going digital and who's not.

"It's about understanding the market issues to help us be smarter and more structured in our approach," he says. "What we're developing is a lens that we'll use to look at the authors in relation to which segments are most relevant to them. It's about being a little clearer about consumers, products, channels, prices and marketing. It's not about radical, bold headlines. It's about making projects smarter."





Having spent four years at record label EMI it would be easy, perhaps, for Boyle to draw parallels with the music industry. But there are plenty of differences between the two sectors – not least the fact that few readers have switched entirely to ebooks. “A good chunk of people are digital-only in the music world, whereas physical books do still have a role. This is quite a profound difference,” he says.

“I guess each media industry has a different balance. In music, digital is something of a dirty word. But in the book world it’s exciting. There are similar issues in terms of how people engage with the products, but there are different implications too.

“Every consumer segment we’ve identified at HarperCollins values books, even if they’re incredibly digital,” he argues. “Vinyl was a ▶

special object whereas CDs are not that exciting. Plastic gets tatty. Many consumers are ditching CDs, whereas books are beautiful things that have value. They play a different role. A book is something very different to a CD. You can't compare the two directly."

The publishing industry is also seeing something of a slowdown in the adoption of ebooks, Boyle notes: "The numbers are flat. In terms of finding out the why behind this, I guess there's more work to do." Meanwhile, Rupert Murdoch – a steadfast believer in the importance of print journalism – isn't about to give up on books either it seems, given News Corp's recent (failed) bid for Penguin and talk of a possible merger between HarperCollins and Simon & Schuster.

## New beginnings

Boyle has been in his role at HarperCollins for less than a month at the time of our interview. It's early doors, then, but he reckons anything is possible with a clear vision of what you want to achieve. "We're in step one right now. I'm trying to tease out insight and work out how research can help," he says, circling back to talk about the online dashboard he's building. "We'll allow people to integrate the dashboard in their own way. They don't need to call me to use it. It's about spending time with people, making sure it works, making the tools exciting and letting people do it themselves."

The dashboard has been designed for ease of use. It features a drop-down menu of authors and genres, which can be split out into thousands of alternatives, but which helps to distil down key pieces of insight. "The idea is that if you pick an author or a genre it helps you to understand the consumer segments and their relationship," Boyle says. "It's author-specific and genre-specific. You can look through different lenses at consumers and explore their relationship with the author and the genre."

It's built on a cloud-based visualisation technology from Microsoft and has been amended numerous times over the past weeks following conversations with individuals around the business. Boyle is clearly not too precious about the way things are done, as long as his colleagues choose to use the insight he's offering.

"You have to have conversations with people

“For me, social media doesn't rival what you can get from surveys. My personal interest is in understanding the market at large”

## HarperCollins

David Boyle is compiling a dashboard to allow colleagues to explore the different types of HarperCollins readers



### RULES TO LIVE BY

#### David Boyle's tips on delivering impact

- Be helpful  
"My top priority right now is to have a solid bed of research to really help people in what they are doing. It's got to actually help them."
- Context is key  
"You need to understand the wider context in which data sits and often research is the only way to do this. Other types of data are for colouring in the gaps."
- Think 'DIY'  
"Spend time with people, make sure it works, make the tools exciting and let people do it themselves."

to make sure that it works for them," he says. "The dashboard today looks nothing like it did three weeks ago. We had a rough sketch on day one – but it's not about imposing something on people. It's about context, and letting the tools fit into their daily life. That's the aim. The alternative is having to call the research guy to book a meeting."

At EMI, Boyle strived to create a culture of insight. "Our differentiation was in understanding and respecting data, not the data itself. It was in our bones, our language, our culture. It felt sensible and natural." Yet he didn't set out to achieve this by dictating from above. Rather it came about through a process of diplomatic, grassroots engagement.

This is the process that's now underway at HarperCollins. He's starting small – his department is effectively a one-man band – but Boyle's clearly building towards something bigger. "I'm having fun," he says. "I'm sure the team will grow but it's step by step." It was a similar story at EMI, where the 'million-interview dataset' he created started with just him, his laptop and some Excel software.

## Hearts and minds

Boyle might find himself in a new industry, dealing with different dynamics, but one thing that has stuck with him through the transition is his scepticism towards the use of social media for research purposes. "Every few months I check in to see where it is and how far it might have developed – and then I put it back in the drawer. For me, social media doesn't rival what you can get from surveys," he says.

It's a view that has left him somewhat isolated when presenting conference papers to rooms full of market researchers, for whom online surveys can seem rather old-school – if not dreary. "My personal interest is in understanding the market at large," Boyle argues. "There are lots of vocal people who love books out there but there are also those who don't. We want a representative sample. It's about avoiding bias." ▶

## STATS

**£1.9bn** – the total value of the UK book market in 2012, including £250m of ebook sales, according to *The Bookseller*. Richard Mollet, chief executive of the Publishers Association, said: "While digital sales are growing by comparison to physical sales, nothing points towards a catastrophic cannibalisation of one format by the other, but rather it points to a diversification of the reading audience"

**28%** – the proportion of adult fiction and non-fiction sales in the US that are in the format of ebooks, according to the Association of American Publishers

**20%** – the proportion of US adults who own an e-reading device, according to eMarketer

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Take for example the fact that, statistically, people who tweet about music are wealthier, London-based fans of dance or electronic music and dislike more mainstream music.

“They may tweet that they like a track, but the mainstream person who is not tweeting is not

Ebooks and e-readers might be popular, but very few people have gone digital-only, says Boyle



there,” says Boyle. “I much prefer representative research.”

Similarly, he’s found that people can become over-awed with big transactional datasets. At EMI, he says, people would assume that because they had iTunes and billions of transactional records they had access to a wonderful, clean dataset. “But the whole population doesn’t use iTunes,” Boyle says. “You only see the EMI part of that data. It’s actually very limited. We need to know what people buy from other places.”

Boyle is a strong believer that to make data and insight effective you need to make it palatable to an organisation at large. His approach could be described as a kind of democratisation of insight. Rather than telling people what his research has uncovered and what that means they should do, he seems to prefer it when colleagues are empowered to come to their own conclusions. Modest by nature, he does acknowledge that this is where some of his success lies: “I like to help people. It’s about being diplomatic and speaking the right language. That’s where many analytical projects fail.”

Helpful he may be, but Boyle stresses that he’s no pushover. “It’s not about telling people what they want to hear.” Instead his approach is guided by the knowledge that, in the creative industries especially, it is people with hearts and minds who make decisions. No amount of data can change that unless the individual decides that the data has something useful to offer. Pragmatism is his watchword, then – not data for data’s sake. ■

## CAREER PROFILE

David Boyle graduated from the University of Warwick in 2000 with a degree in mathematics. He describes himself as “not creative in the slightest” yet has worked his way up into insight director positions at music label EMI and now publisher HarperCollins.

Boyle says he is passionate about bringing consumer insight into the heart of decision-making, claiming to enjoy galvanising diverse groups of “often sceptical” people around consumer insight. He designed and led a global consumer insight capability at EMI,

building a scalable engine from scratch – one which was later described as “front and centre” of the company’s pitch to buyer Universal, ahead of its £1.2bn takeover last September.

A colleague who worked with Boyle at Tesco describes him as having great skill in

making data understandable to “normal human beings”. Clearly enthusiastic about what he does, he has also been described as “a breath of fresh air” by Carlos Somohano, who heads up the data science community, Data Science London.

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CV  
DAN  
RUSGA

**Education:**  
Swansea  
University

**1990:**  
Joins Carlsberg as a graduate trainee, and holds various commercial and marketing roles, including account manager for Tesco and Sainsbury's.

**1996:**  
Joins St Ivel/Unigate, and holds a number of sales and marketing positions in the yogurt, desserts and spreads categories.

**1999:**  
Joins Diageo/Pillsbury as customer marketing controller, working on brands such as Häagen-Dazs, Green Giant, Old El Paso, Pillsbury/Jus-Rol.

**2001:**  
Joins Yeo Valley. Holds various positions, including account controller and head of retail marketing.





# Fresh perspective

Yeo Valley's Dan Rusga tells **Jane Simms** how customer insight helped revitalise a dairy brand business soured by recession

**W**hen Dan Rusga joined family-owned dairy company Yeo Valley at the end of 2001, its star was in the ascendant. For the next six or seven years it enjoyed meteoric growth – sales rose by between 20% and 40% annually, fuelled by the popularity of organic produce.

“It was a joy, it was so easy,” recalls Rusga, who is now head of retail marketing. Retailers willingly devoted shelf space to the brand and welcomed new products. Then recession hit. “At the beginning of 2008 something started to happen, and in 2009 growth stopped.”

Discounters such as Aldi and Lidl capitalised on the fact that people had less disposable income after the crash, and the traditional grocers sought to defend their market share by launching private-label value brands. The shift put “huge pressure” on shelf space, says Rusga, and because organic sales had fallen, that’s where the space came from. “Consumers were buying slightly less of our brands, but it was the shelf space issue that gave us the most problems.”

## Losing its fair share

Yeo Valley started out as a private-label supplier, primarily to Boots and Tesco, in the late 1970s. ‘Yeo Valley’ as a brand only came into existence in the early 1990s, after managing director Tim Mead advised some local organic farmers to form a co-operative and agreed to try and help make a market for the milk they produced. Mead’s decision to launch the Yeo Valley brand, and to make it organic, wasn’t based on research, but on his belief that it was the right thing to do from both an ethical and business standpoint, says Rusga.

While Yeo Valley’s private-label business grew during the recession, it was dependent on individual retailers’ strategies. For example, Tesco supported its own discount brands and value lines, but in the mid-market it supported major brands such as Müller and Danone. Asda, by contrast, focused more on the private-label market and launched its ‘Chosen by You’ mid-tier private-label range.

“So things ebbed and flowed, but the very big brands (those who could afford to advertise) did well, as did private-label,” says Rusga. “Our private-label sales continued to grow, but the product mix wasn’t always favourable. And brands in third, fourth and fifth place, including us, were squeezed.”

Yeo Valley survived as an independent business because of its balance between brand and private label and because of its broad customer base. But the top team knew that if the brand continued to lose share, the company’s long-term profitability would be compromised. It needed a new brand strategy.

“The financial year 2008/2009 was a watershed in terms of how we looked at consumer insight, because before that we were able to ride the organic wave,” recalls Rusga. “At the point where we needed to take stock, we brought in Big Fish, a brand consultancy, to help us try to see the wood for the trees. The initial work we did with them, ironically, took us back to our roots and what had started us off in the first place.”

## Bring the beat back

In 2001, the Yeo Valley branding emphasised its organic credentials. Over the years, as consumer perceptions of ‘organic’ began to change – people increasingly questioned whether the



## YEO VALLEY TIMELINE

**1400s:** Ancestors of Yeo Valley managing director Tim Mead are recorded farming in Somerset.

**1950s:** Roger Mead (Tim's father) leaves school to take up dairy farming.

**1961:** Roger and wife Mary move to Holt Farm, starting out with 30 cows, a few sheep and some arable crops.

**1969:** They buy the adjoining farm, expand the herd and start to make yogurt.

**1980s:** Yogurt is increasingly popular and the Meads produce more milk for the supermarkets. They employ 30 people in the dairy.

## RANGE REVIEW

Yeo Valley has four main product categories:

- Private-label and organic branded yogurt
- Chilled dairy desserts
- Ice-cream
- Organic dairy products, including milk, cream and butter



benefits justified the price premium – the company started to place more emphasis on the name ‘Yeo Valley’ instead.

“Organic is fundamental to our brand, but we had to find the levers that really worked with consumers today,” says Rusga. A period of “navel-gazing” led to the primary insight that the Mead family was the beating heart of Yeo Valley. “It was their enthusiasm and vision that had shaped the brand, and the main brand attributes were things that were important to them and, as we knew from previous research, to our customers too.”

The five ‘heartbeats’ the team identified were Real (Yeo Valley is a real place in Somerset), British, Family (the business is family owned), Fun (it is quirky and atypical) and For Ever (it is sustainable).

They then tested out this story (“which was real; we didn’t have to fabricate it”) on consumers. They researched around 70 consumers in groups of between eight and ten and

found that whether they loved, were ambivalent about or had never heard of the brand, the story resonated with them. They loved the taste of the products too.

“We had improved every recipe, but it was more of an evolution than a revolution,” says Rusga. “A benefit of working across brand and private label forces you to be very objective, and we knew from previous research that consumers’ palates are increasingly inclined towards ‘mild and creamy’ and away from the ‘sharpness’ that used to characterise yogurt.”

At the same time, they researched their retail customers. “It is difficult to get supermarket buyers to branding groups – though they are very keen on private-label groups. So we brought in 100% Cotton, a research and strategy company, to do individual phone interviews with them. They are typically fairly blunt in their feedback, but their views were similar to those of consumers – principally that they liked the brand, but it was too reliant on the organic platform. Many consumers had moved on.”

Encouraged, the marketing team briefed Big Fish to work on how the brand ought to look. A further round of research revealed that

consumers didn’t think the packaging reflected ‘the five heartbeats’.

Big Fish came up with some new design options. Rusga and his colleagues did a retail roadshow between October and December 2011, and the brand was relaunched in March 2012.

The brand and private label each account for around half of the group’s income, though the brand side fell to close to 40% in 2009. The new strategy – to grow the branded side of the business significantly over the next five to ten years – will change that balance in favour of the branded business.

## Talking shop

Insight drives the development of both brand and private-label at Yeo Valley. While the current focus is on the brand, that hasn’t always been the case.

“Retailers expect us to help them develop their ranges and brands,” says Rusga. “For example, we’ve produced private-label luxury yoghurt for all of the big four grocers for more than ten years. There is lots of innovation there and we continually challenge ourselves to come up with the next even more indulgent product range.”

One of the research techniques that 100% Cotton has introduced is ‘triangular’ research, which involves 100% Cotton, Yeo Valley and the retailer in the same group. While they use the technique on both private label and brand development, it tends to work more effectively on private-label projects where the retailer feels like more of a stakeholder, says Rusga.

He explains: “100% Cotton facilitates an initial workshop – either at a neutral venue or our offices – to air issues and get everyone’s

objectives on the table. It is execution that can make or break a good idea, so being able to stare retailers in the eye and say, ‘We have to put this in at least 500 stores with x amount of shelf or fixture space to make it work or it will all come to nothing: can we deliver that?’ is extremely valuable.”

This approach enables the company to revise its plans if needs be, but, says Rusga, “Retailers are more receptive when we see them face to face.” And it’s not just the buyers who are involved, but also representatives from new product development, technical and customer planning teams, for example. “This sort of

“Organic is fundamental to our brand, but we had to find levers that really worked with consumers today”

**1987:** Having trained as an accountant after leaving school because the family farm couldn’t generate an income for him, Tim returns to the farm.

forum allows you to tease those out early on and get us all pointing in the same direction.”

Yeo Valley and 100% Cotton have worked together on several workshops involving the top three grocers.

“This technique can be very powerful if you can pull it off,” says Rusga. “A business that relies on multiple grocers needs shelf space, and if you don’t get it, that limits your success. 100% Cotton are brilliant at facilitating these things: they are one of the few agencies who understand how retailers tick and the importance of winning their hearts and minds as well as those of consumers.”

### Milking it

Yeo Valley has complemented its work with retailers with TV advertising designed to raise brand awareness. The first campaign, in 2010, featured swaggering good-looking young farmers rapping about ‘Yo Valley’ in ad breaks during ITV’s *X Factor*. The ad rapidly went viral and has had nearly two million hits on YouTube. In 2011 a second campaign, also aired during *X Factor* breaks, featured a fake farmer boy band.

The result was significant shifts in brand awareness, says Rusga: “They scored particularly well among the younger audience and got great cut-through with retailers too.” The Rappers ad alone raised brand awareness by 71 per cent, according to The Nursery. And although the ads weren’t necessarily designed to sell more products, combined with in-store marketing activity they did have a positive effect on sales. Rappers brought half a million new households to the brand, according to Nielsen.

No further mass campaigns are planned, at least for now. Instead consumer communications are more targeted (principally at mothers for whom family and good food are important) and include on-pack promotions with brands with similar values, such as Land Rover.

“It’s all about trying to recruit willing customers to our database, so we can talk to



Farm factor: Yeo Valley’s Boy Band and Rapping Farmers ads led to significant shifts in brand awareness, says Rusga

them about what we do,” says Rusga. “We now have 150,000 customers on the database, compared to 70,000 before the relaunch.”

What effect has the retailer activity, ad campaigns and relaunch had on sales and, crucially, profits?

“It’s still a fiercely competitive market; things won’t ever be the same,” admits Rusga. “On the brand side, we are the third biggest in the UK, and our sales grew by 18% last year, compared to our nearest competitor, which grew by 10% over the same period.”

For the year ending 27 May 2012, pre-tax profits for the whole company were £3.6 million, more than double the £1.6 million figure in 2011, but still £2.2 million below the £5.8 million achieved in 2010. Turnover in 2012 increased by 13 per cent, from £201.7 million to £228.7 million.

“The brand has recovered a lot of the ground it lost,” says Rusga. “That performance has come from working with what we’ve got, rather than from listings in additional stores. However, we’d like to think our performance justifies an increase in both space and store numbers.” ■

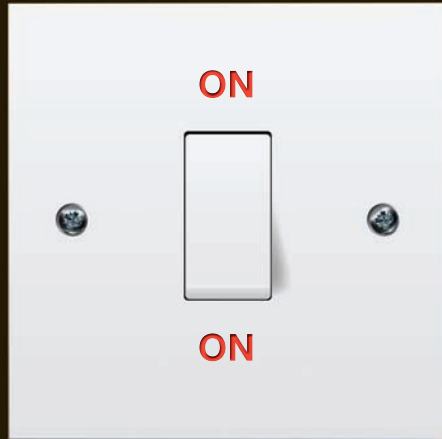
**1990:** Roger dies in a tractor accident, leaving Tim and Mary to manage the business, which now employs 135 people.

**1994:** They start to buy milk from a group of organic dairy farmers to make yogurt, and the Yeo Valley Organic brand is born two years later.

**1999:** Move to head office in village of Blagdon. 600 employees.

**2001:** Yeo Valley wins Queen’s Award for Sustainable Development (and again in 2006 and 2011).

**2010:** Produce first ad, Rapping Farmers.  
**2011:** Produce second ad, Boy Band.  
**2012:** Relaunch the Yeo Valley brand.



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Lauren Cody



# The meat of the matter

Research and insight play a central role at McDonald's, helping to keep the company focused on better serving customers. Its insight VP Lauren Cody tells all to **Joe Fernandez**

“

McDonald's is a customer-oriented business, and research and consumer insight are our lifeblood,” says Lauren Cody, vice president of business strategy and insight for McDonald's UK. “It runs right through the heart of our planning process, the development and testing of new products, and the introduction of changes to our operations and customer experience in our restaurants.

“Our strategy is built and shaped using a range of research and insight methods; from collating qualitative and quantitative research to garnering insight from unprompted customer feedback and engagement on social media. But overall, we take a 4-Cs approach with the aim of producing insight which encompasses and adds value to all key pillars of our business – customer, competitor, company and (trading) context.”

That's the McDonald's of today: confident, successful and in tune with customers. Ten years ago it was a different story – 2003 was a watershed year for the fast food chain. That was the year it made its first quarterly loss and, smelling blood, the health lobby ratcheted up the pressure on the firm.

Jim Cantalupo, who was CEO at the time, said: “McDonald's has lost momentum... and lost what it takes to make customers feel special.” He started implementing a turnaround plan but died suddenly in 2004. Jim Skinner, his successor, evolved the Plan to Win strategy that has turned McDonald's into the business it is today.

Here, Cody picks up the story to tell us first hand how research and insight makes a real difference to the company.

### Cody on... research and the turnaround

“Over the past decade, we've embraced change and used it to drive our turnaround – from changing the way our restaurants look and feel to evolving our menu and building an industry-leading training programme for our employees.

“There's no doubt that research and insight played a pivotal role in our turnaround; it's what gave us the confidence to change and it guided us as we navigated ▶





Customer input was sought on all aspects of the restaurant redesign process, Cody says – from the choice of furniture and lighting through to colour palettes

new, uncharted ground. We learned the hard way what happens when you stop listening to your customers and it left us determined to keep our finger on the pulse and keep in touch with what our customers want.

“Back when we realised we needed to change our approach, to start listening to consumers and engaging with them, we started looking both externally and internally to see what we could do better.

“In all of our studies, focus groups and other consumer-led research, one thing stood out above everything else – the need for us to rebuild consumer trust and drive reappraisal of our brand. To do this, we had to go back to basics, scrutinising everything that was causing distrust in our brand and tackling all the ugly, negative stereotypes head-on.

“By the time I joined the company in 2007, the recognition that we needed to put the customer at the fore had taken root and was well understood by the leadership. The challenge

now was to show our customers that we were listening, that we were ready for conversation and that we were prepared to respond.”

### Cody on... insight and the planning process

“The process of involving customers really begins at the start of our planning cycle. To kick off our annual planning process, myself and other executive team members go out and about to see what’s new in our marketplace, to meet our customers in person, hear their thoughts on our brand and business – what they think works and what doesn’t.

“This exercise allows us to get a feel for how our customers make decisions – why they visit our restaurants, what they are feeling and what they think when they see our menu. Speaking to customers face to face makes a huge difference. You get a far greater connection by spending time actually talking to a customer and watching their body language and behavioural responses.







“To be as comprehensive as possible we also visit competitors and discuss similar feedback. The process helps us understand where we need to make changes and how we can create a better restaurant experience. The whole exercise demonstrates how consumer expectations are always changing and that you have to stay in touch with them.”

### Cody on... the customer experience

“We use customer research to inform us on every facet of our business – what customers think and feel about our restaurant experience, the presentation of our menu, the look and feel of our packaging, the clarity of our nutrition information, how we develop an advertising campaign, how we introduce a new product, how our employees are feeling and what support they need to ensure a great customer experience.

“Up to 80% of brand perception is driven by a customer’s actual experience in our restaurants, so getting this right is one of the most important things we can do.

“In the spirit of continuous improvement and bettering our customers’ restaurant experience, we undertake regular mystery shop visits, track core quality, service and cleanliness measures and monitor any trends in customer praise and complaints that are received by our customer services team.

“Our entire system is about putting customers first. We encourage all our staff to always have the customer in the forefront of their mind. Our goal is to be a modern, relevant and enjoyable brand that is in touch with its consumers.

“One example of how we put this thinking into action was the decision to modernise the restaurant environment. We listened to customers and sought their views on all aspects of the redesigns – from the furniture and

lighting right through to colour palettes and general comfort. It was a pivotal part of our turnaround efforts because it was the single biggest visible signal to customers that we were changing as a brand. It helped us drive brand reappraisal and encouraged people to come back to us more often.”

### Cody on... supporting suppliers

“Research and insight also underpins our corporate initiatives. For example, Farm Forward, our long-term commitment to support British and Irish farming, was created after spending several years talking to 500 farmers. We need a healthy farming sector to ensure continued supply of our menu ingredients. And we know from talking to ‘Happy Meal Mums’ that serving high-quality ingredients that are responsibly sourced is important to them. So developing a programme that supports the farming sector makes a lot of sense and is important to our customers.”

### Cody on... health and nutrition

“More and more consumers are expecting brands to be open and transparent. Knowing this, we made the move to provide nutrition information at the point of

purchase on our menu boards in September 2011. We wanted to be as transparent as possible and provide this information, which has been available on tray liners and online for years, to customers before ordering their food.

“Insight was pivotal in driving this decision – and it wasn’t taken lightly. With nutrition information, we knew we couldn’t just re-design our displays without finding out what impact this would have on our customers and what they wanted.

“To inform our decision to display calories on menu boards, we undertook extensive research to understand better how customers view and

“ You get a far greater connection by spending the time actually talking to a customer and watching their body language ”



# McDonald's



use nutrition information. This included a pilot in over 100 restaurants, involving more than 2,000 customer interviews and using eye-tracking technology to understand how people absorb menu information when choosing their food and placing their order. The results of this comprehensive research helped us to create what you now see in every UK restaurant.”

### Cody on... rolling insights

“The process of gaining insight and taking a temperature check of how your customers think you are doing should never stop. We have an ongoing corporate barometer tracking our progress and we also subscribe to the TNS-RI consumer index. These help give us a snapshot of brand perception and start to isolate what factors might be positively or negatively affecting our brand. Like any corporate brand, it’s incredibly important that we stay focused on this and that we are making progress wherever possible.”

### Cody on... technology

“The addition of IT responsibilities to my remit is indicative of how technology is and will continue to be central to how we evolve our customer experience and stay in line with customer expectations. As customers become more digitally savvy, they will expect us to move with them and we will be working hard to

ensure that we seize every opportunity presented to us. The great thing about some of the new technology becoming available is that it is intuitively serving our business needs as well as the needs of our customers.

“For instance, there is definitely scope across the business for greater insight to be drawn from online communities. We have an online community which we use for a wealth of insights, giving us the ability to test new developments in real-time with a dedicated pool of users. Social media has also continued to mature and now holds court as an incredibly sophisticated and responsive mechanism that can offer insightful snapshots of your brand’s external perception, as well as enabling brands to enter new forums and become part of the new communications culture.”

### Cody on... rules to live by

“My ultimate advice for any brand is to never stop listening to your customers. No matter how customer focused you think you are, you can always go further. Keep listening, extract insights, communicate your learnings across your business and use this to keep evolving your business at the pace and in the ways that are right for your customers.” ■

Joe Fernandez is a freelance journalist and former deputy editor of *Research* magazine

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# Economic prospects remain bleak, but survey innovation shines through

THE DOWNBEAT TONE OF AGENCY RESULTS CONTRASTS SHARPLY WITH THE UPBEAT OUTLOOK OF THE INSIGHT INDUSTRY'S TECH UPSTARTS, SAYS OUTSELL ANALYST **HARRY HENRY**



Not banking on a European recovery... David Calhoun

**Annual results have been** coming in thick and fast from public research companies in recent weeks – but for the most part, there's not much to get excited about. Two of the largest firms, WPP's Kantar Group and Nielsen, reported fairly flat revenue figures. Ipsos was up significantly, but that's because the company now reports combined results following its takeover of Synovate.

Growth at Gartner, ComScore and GfK was in the low double-digits, while Harris Interactive showed shrinking revenues again (in the first six months of its fiscal year) and Forrester announced layoffs in preparation for an expected slowdown in 2013.

Though Forrester's woes seem largely company-specific – with low growth blamed on problems in the sales team – the downbeat tone of its announcement was echoed in part by those of WPP, Nielsen and Ipsos.

Nielsen CEO David Calhoun spoke of seeing a “tougher environment for corporate spending”. WPP said clients' discretionary spending in mature markets remained “under review”. And Ipsos launched a no-holds-barred

attack on what it sees as the political failings in the Eurozone that have led to “strained growth prospects”.

Broadly speaking, the message here is not a positive one. But blame can't only be laid at the door of macro-economic developments (or the lack thereof). In keeping with most other information-based businesses, research agencies are having to contend with the shift towards a digital economy, which is impacting on their

## KEY PERFORMANCE INDICATORS

### 2012 VS 2011 REVENUE

<b>Arbitron</b>	\$449.9m ▲ 6.5%
<b>ComScore</b>	\$255.2m ▲ 10%
<b>Forrester</b>	\$292.9m ▲ 3%
<b>Gartner</b>	\$1.6bn ▲ 10%
<b>GfK</b>	€1.5bn ▲ 10%
<b>Harris Interactive*</b>	\$70.1m ▼ 9%
<b>Ipsos</b>	€1.8bn ▲ 31%
<b>Kantar Group</b>	£2.46bn – no change
<b>Nielsen</b>	\$5.6bn ▲ 1%

\*Six months to 31 December



Mature markets? Or just stale?... Martin Sorrell (left) and Didier Truchot (right)

traditional services. This shift was exacerbated by the recession. Client demand has not emerged from the recession in the same shape as it entered it. Researchers are having to ask all sorts of questions about what market research is like today and what it should look like going forward. Yes, there is still a need for market research – that’s without a doubt. But like all businesses, research firms need to think about how to re-invent themselves to meet the needs of the clients of the day.

### Young upstarts

New companies find it easier to adapt, of course. That’s why outside of the sphere of market research agencies, the outlook seems brighter. Each week brings a stream of funding announcements from new start-ups which are offering insights, analytics and big data tools for marketers.

Indeed, the biggest financial news of the year so far has been SurveyMonkey’s \$800m private capital financing, one of the largest ever seen for an internet company. At 13 years of age SurveyMonkey can hardly be

considered a start-up, but it is a disruptive influence. Increasing numbers of client companies are turning to the DIY model that SurveyMonkey supports – that is, sending out short, quick surveys that are designed by in-house research departments, not research agencies.

One of the interesting aspects of SurveyMonkey’s growth is that it went straight to the end-user and established a great footprint in both large corporations and smaller consulting firms. It has not only built a great client list, but has shored up its platform and developed add-on services in sampling and analytics that enhanced the offering and answered customer needs.

But while the company’s growth and high valuation could be taken as validation of a strong market research segment, SurveyMonkey actually caters to a very different audience. The real play here is the platform, the subscription-based revenue stream, and the company’s solid reach into a much larger buyer base than that addressed by traditional market research players.

Others are following SurveyMonkey’s lead in launching surveys for a different class of research buyer. A Pittsburgh-based company called CivicScience is partnering with a number of web sites to repeatedly execute short, two-to-three question surveys, which are then stitched together using IP address mapping and cookies to create response profiles. Then there’s Google’s own Consumer Surveys solution, which is throwing up survey walls across the web, prompting site visitors to answer questions in exchange for access to content.

### Not dead yet

That so much innovation is taking place around surveys might seem curious given how frequently surveys are written off as an outmoded form of data collection. Yet it confirms what we, as well as others, have long believed: that surveys will continue to be at the heart of the business for years to come – only the nature of those surveys will change. They’ll get shorter. They’ll get smarter. And fewer of them will be designed and

## VIEW FROM THE TOP

### HOW AGENCY CEOs SEE IT

#### WPP’s Martin Sorrell:

“The central issue continues to be like-for-like revenue growth in the custom [MR] businesses in mature markets, where discretionary spending remains under review by clients.”

#### Ipsos’s Didier Truchot:

“A deteriorating macroeconomic environment, uncertainty in the United States and several wrong turns in Europe strained economic growth prospects and hence the business climate.”

#### Nielsen’s David Calhoun:

“With Europe, we’re in the third year of a flat world, and I don’t expect it to jump up at all. There’s nothing in our plan that suggests any rebound in Europe... but I do expect continued good performance in the US.”

delivered by MR agencies.

Of course, with all the data being captured as a byproduct of consumers’ digital activities it is no longer necessary for researchers to be the primary collectors of information. Their focus has to switch to an understanding of the “why” behind the numbers and the motivations of the consumer. Specialist practice areas within research agencies that address these needs will grow to contribute a larger proportion of agencies’ revenue. Perhaps then things won’t look so gloomy.

**Harry Henry** is vice-president and practice leader for marketing, media and analytics at research and advisory firm **Outsell Inc.**  
[www.outsellinc.com](http://www.outsellinc.com)

# Shop assistant

EUCLID'S **WILL SMITH** GETS A \$17M INVESTMENT TO HELP PHYSICAL RETAILERS

**Bricks-and-mortar** retailers face a battering from their cheaper, leaner and nimbler online rivals. But Euclid CEO Will Smith is ready to lead the fight back. His firm recently closed a \$17.3m series B financing round led by Benchmark Capital with participation from NEA, Harrison Metal, and Novel TMT Ventures.

Smith is looking to level the competitive playing field by giving shop owners the tools to measure shopper behaviour to a level of detail previously only enjoyed by e-commerce retailers.

"Up until now, many people have assumed that the reason online retail has been outperforming offline is things like pricing,

selection or convenience," Smith says. "But as offline retailers knock down each of these assumptions, there's a growing understanding that online's biggest advantage is data – getting a complete picture of what attracts and converts shoppers and then using those insights to improve the shopping experience."

Euclid works by tracking the wi-fi signals given off by mobile phones or by using specially-fitted sensors to monitor how people move around shops so retailers can devise strategies to turn browsers into buyers.

"Traditional people counters – essentially electronic turnstiles – have given retailers a very narrow understanding of shopper behaviour based on the



Levelling the competitive playing field... Will Smith is helping high street retailers gain a deeper understanding of consumer behaviour

number of heads that go in and out of a store," says Smith. "With wi-fi technology, we have the ability to provide retailers with a much deeper understanding of how their marketing activities and store operations impact customer engagement and loyalty in an affordable, scalable way."

Smith describes Euclid as Google Analytics for the physical world – an apt

comparison given that one of Euclid's co-founders helped develop the Google Analytics technology. "We give physical retailers the same level of visibility into shopper metrics like visit duration, visit frequency and bounce rate," says Smith.

"This can dramatically shorten the feedback loop between testing a new marketing campaign and understanding the results, which helps brick-and-mortar retailers respond more quickly to shopper preferences and, ultimately, be more competitive."

But measuring shopper behaviour is really just the first step for offline retailers, says Smith. "The most important thing is taking those insights and putting them into practice – by constantly testing new ways to improve the customer experience, getting instant feedback and then iterating rapidly. That's something that online retailers like Amazon truly live by." ■

## Spy before you buy

IN-STORE INTELLIGENCE-GATHERING IS FUELLING ONLINE SALES

Showrooming – where shoppers visit a store to research a purchase before buying online – is a major problem for physical retailers. Target and Best Buy were early victims of this trend in the US, losing consumer technology sales

repeatedly to Amazon. Both firms recently introduced Amazon price-matching policies. But other stores may be forced to follow suit if showrooming behaviour spreads.

A survey by location analytics firm Placed

identifies Bed Bath & Beyond, Pet Smart and Toys R Us as the most 'at-risk', based on an analysis of the location data of self-confessed showroomers.

CEO David Shim says it's not a question of when or if showrooming will impact their business: "An aisle to Amazon is already in their stores."

See you at  
Bikram!  
If I can leave  
the office

I wonder  
what's on TV  
tonight?

My phone is  
embarrassing!  
I want an  
upgrade

My ISA isn't  
working for me,  
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# CUTTING THROUGH THE HYPE

THERE'S PLENTY OF BIG TALK ABOUT THE POTENTIAL OF BIG DATA, BUT HADOOP CO-CREATOR DOUG CUTTING IS ADAMANT THAT THIS ISN'T ANOTHER TECH BUBBLE. INTERVIEW BY **BRIAN TARRAN**



**B**ig data's parentage is as diverse and widely dispersed as the information sources the term refers to, but Doug Cutting is definitely one of its fathers. He's the co-creator of Hadoop, the open-source software framework that's become pretty much the de facto standard for companies looking to churn through masses of data to get to the insights that lie beneath. At its most basic definition, Hadoop takes a distributed network of computers and gets them to work as one to solve particularly thorny analytical problems.

Yahoo and Facebook are users of Hadoop, as are Amazon, eBay, Apple and Google. But this is just the beginning, says Cutting. Big data might dominate marketers' discussions but measured by the number of people actually using it, "the penetration has not been that great yet," Cutting says. "We're seeing a lot of large companies dabbling in big data but they haven't by any means exploited its full potential."

Cutting doesn't believe big data is overhyped, despite what others may say. Gartner's famed Hype Cycle curve might have it sitting atop 'the peak of inflated expectations' pending a drop into the 'trough of disillusionment', but Cutting is adamant that big data is no bubble.

"I don't think that there's excitement about the technology that is in excess of the potential of

the technology," he says. "I don't think the underpinnings of this are false and that people will eventually realise that and it will all fall away in the way that bubbles classically do."

## CHEAP AS CHIPS

There are a couple reasons why big data is big news right now. The first is technological. Moore's Law might have been written with chips and transistors in mind but it applies to computing as a whole. "The amount of computing you can buy per dollar is doubling every 18 months or thereabouts," explains Cutting. "For 30 years we've seen this happen and it's been more or less borne out in processor speeds, memory sizes, hard drive sizes and networking speeds.

"It's now economical to store all sorts of things that people previously didn't think it was economical to store. You can store every single business transaction for all time, and moreover, you can do that at a very fine-grained level. You can afford to buy the hard drives to store all this stuff on."

Businesses not only have the ability to store huge amounts of data, they are actively doing so in the belief that having more data to analyse is a useful thing. "The metaphor I like to use is resolution," says Cutting. "You might have a picture of what you're doing with your business, but you could have a much higher resolution picture of it if you saved more data – which would allow you to zoom in and understand how things are working in different parts and different ways, with different kinds of customers and different kinds of situations over a greater period of time.

"With that better-resolution picture, you can better tune your business and take advantage of things that you weren't able to see before because they were hidden from view."

Of course, naysayers aren't disputing that big data is 'a good thing', only that very few companies will be able to take full advantage of



what big data has to offer. Certainly it won't be for everyone, Cutting says. Your local family-run grocer is probably not going to deploy a big data system in the back room at the market because "they just don't have that much data", he says. "It takes a relatively large operation to have the quantities of data to really benefit from this."

## THINK BIG

But while there might be a limit on the number of companies with enough data to make use of big data technology like Hadoop, there are lessons business of all sizes can learn from the big data mindset. Cutting points to *New York Times* statistician and celebrated poll-cruncher Nate Silver as someone who takes a 'big data' approach to the way he thinks about and works with data.

"It's about using data that you were ignoring before," says Cutting. "In Nate Silver's case, you had pollsters who each did their own polls without really looking at everyone else's work. But Nate was of the view that we should look at all the polls out there and average them together and combine them – cleverly and intelligently. If we did that, he knew we could get a much better poll."

"Now, whether or not you want to ▶

## FACT FILE

Hadoop was named after Cutting's son's plush toy elephant. The creature even features in the Hadoop logo.



### WHAT IS HADOOP?

Cutting says: "Hadoop provides a way to take lots of commodity hardware – the CPU chips, memory chips and hard drives that are in thousands of PCs – and make it look like one giant PC that can process data in parallel. It can take all of those thousands of processors and run them together over a big data set that is stored on thousands of hard drives allowing you get your answers in relatively short order."

“ I don't think that the underpinnings of big data are false; that people will eventually realise this and it will all fall away like bubbles classically do ”



call that big data, I don't know. But it's definitely of a similar spirit and style," says Cutting. "And you don't necessarily have to have a huge amount of data to adopt that approach: to really be looking and analysing and taking even better advantage of the data you have and the computer resources available to you."

It's largely a cultural thing, says Cutting. "Younger companies are going to be better at it; more technically adept companies are going to be better at it. We've seen adoption firstly in web companies, which are generally both young and very technically sophisticated, but now we're seeing it spread to lots of other companies, slowly but surely."

Cutting believes most firms will already have "latent data scientists" residing somewhere within the business, ready to apply big data thinking. "I think of them as spreadsheet jockeys – the sort of people who know a business really well," he says. "They've been there for quite a while. They're smart folks who are numerically inclined, and they're always building these massive spreadsheets and running to the boss with a great idea for how to improve the business. To date, they've only had access to a pinhole-view of the company, and they're doing what they can with that. But when you give them more data, they can produce many more wonderful things."

## THE GRAND SCHEMA OF THINGS

Like all good scientists, however, data scientists need time, space and tools to run experiments – and this leads to another key aspect of the big data mindset: an approach to data storage that Cutting refers to as "schema on read" rather than "schema on write". What this means is that rather than storing data in the traditional way – within rows and columns and relational databases – you store information in its raw form to preserve as much detail as you can. "Then as you process it, you pull out the columns that you care about for the particular analysis that you're doing," explains Cutting.

"Trying to normalise data too soon means you could discard things that you might need later on," he says. "As the web and technology and the world changes, the data you get is going to change, and the columns you care about and how you want to populate them change. So if you've lost your original data – if you've loaded it all in and threw away the original data, which is the classic approach – then you can't go back and re-analyse it."

Of course, it's possible to save everything in its original form if you've got a very affordable storage system. And it's possible to extract columns on the fly if you've got very inexpensive computation. Which is where Hadoop and distributed computing comes in.

Cutting says: "When you're experimenting with data, you don't know how you want to structure it, so you need the raw data all there, all in one place. Then, once you've let some smart people loose on it and let them start to experiment, that's when you can really find things out about your company that you didn't know before." ■



## THE MAGIC CIRCLE DISNEY'S RFID WRISTBAND PUTS IT INSIDE THE CUSTOMER EXPERIENCE

Disney coined the term 'guestology' to describe the extraordinary lengths it goes to in its Parks and Resorts business to understand its customers. It all began in the 1950s with the man himself, Walt Disney, walking around Disneyland in disguise. But behavioral observation has moved on somewhat in 60 years.

Enter RFID-equipped wristbands that look set to take the place of credit cards and keys for those visiting a Disney resort. The wearing of these 'MagicBands' is entirely optional, but those who do choose to slip them on will be able to store their personal details on the device and use it to enter the park, pay for food, reserve a place on a ride and unlock their hotel room.

Disney reckons the technology will be "transformational" – and not just from a consumer experience perspective. It will "allow Disney to track guest behavior in minute detail", reports the *New York Times*.

## LEADS IN THE CLOUD ADIDAS AND ACADEMICS BRING BIG DATA ANALYSIS TO THE MASSES

Small- and medium-sized companies with limited data assets and processing power would be forgiven for thinking that the big data revolution was passing them by. But worry not. Four European universities and three companies, including sports fashion brand Adidas, are collaborating on a three-year €4.25m project that aims to build a shared pay-as-you-go-type platform for analysing public and private data sources.

The 'Large-Scale Elastic Architecture for Data-as-a-Service' – or LEADS – project is setting out to "answer the demand of companies wishing to exploit the wealth of public data available on today's internet but who do not have the will or capacity to perform data extraction, storage and processing in-house", says the consortium.

LEADS will crawl the web, pulling in information from public sources, and storing and indexing it on a distributed – and cost-effective – network of "micro-clouds". Companies will then be able to pay to analyse this data and mix in their own sources to customise outputs.

[www.leads-project.eu](http://www.leads-project.eu)

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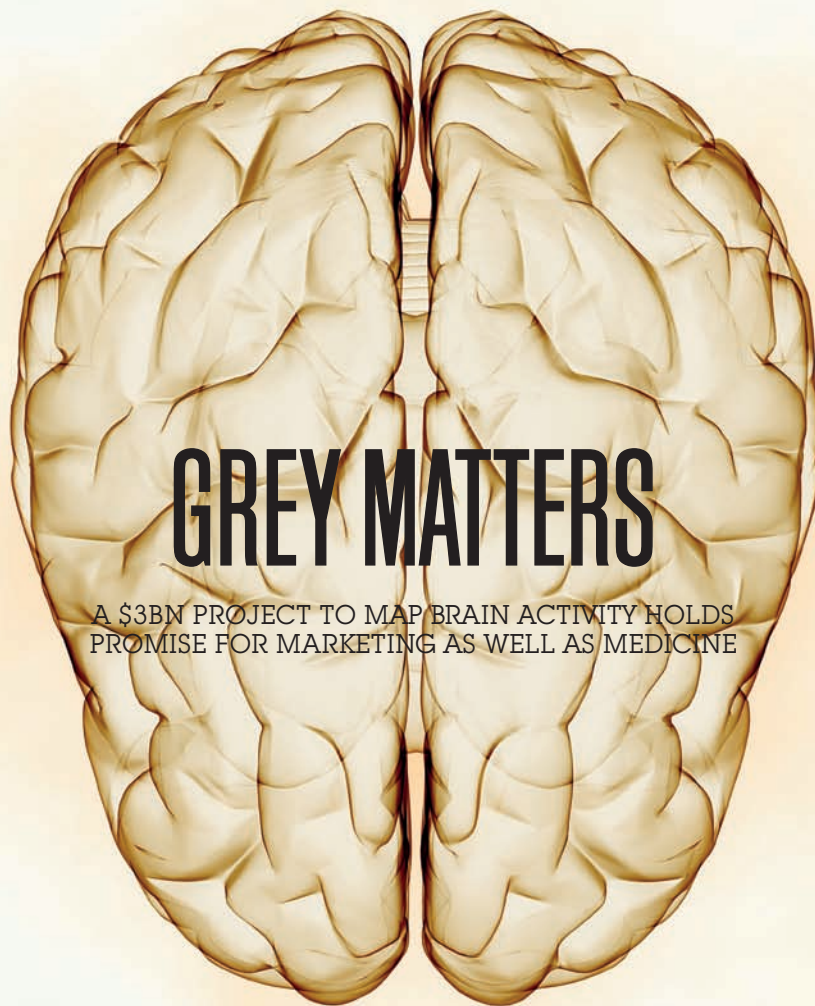
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# GREY MATTERS

A \$3BN PROJECT TO MAP BRAIN ACTIVITY HOLDS PROMISE FOR MARKETING AS WELL AS MEDICINE

“If we want to make the best products, we have to invest in the best ideas,” said US president Barack Obama in this year’s State of the Union address. One of those ideas is a Brain Activity Map (BAM) that aims to do for neuroscience what the Human Genome Project did for genetics.

Scientists are looking for \$3bn to fund the 10-year-long project, which could help to fill the gaps in our understanding of how the brain works. At present, brain scientists are stuck with macro and micro views of the brain. Functional magnetic-resonance imaging (fMRI) and other technologies reveal activity in brain regions, while

scientists also have the tools to investigate how individual neurons work. But, as yet, it’s not possible to track how large sets of neurons work together in networks.

Proposals for the project were published in a recent edition of the journal *Science*, sparking all manner of speculation about how BAM could revolutionise medicine. But what about the burgeoning field of neuromarketing research? How might our understanding of human behaviour be improved, and what might this mean for marketing and new product development?

We asked two experts in the field: Roger Dooley, author of *Brainfluence* and the blog *Neuromarketing*, and Phil Barden, MD of Decode

Marketing, author of *Decoded: The Science Behind Why We Buy* and UK chairman of the Neuromarketing Science and Business Association.

## How important is the BAM announcement for neuromarketing?

**Roger Dooley:**



This is big news for all fields affected by brain science. While there’s much research already being done, the concept of a big, coordinated brain-mapping effort comparable to the Human Genome Project is very exciting.

While the project won’t be focused in the least on neuromarketing, its findings will be helpful to neuromarketers. Every commercial neuromarketing firm will no doubt have their ‘secret sauce’, but the area of the brain they are exploring should eventually have a more detailed map.

In addition, just as the Human Genome Project produced new research tools, BAM may find new ways to measure brain activity that are more precise and cost-effective. Current neuromarketing studies use fMRI and electroencephalography (EEG), neither of which approaches the precision that BAM requires.



**Phil Barden:**

Learning more about the brain implies more understanding of decision-making processes – and that benefits and contributes not only to science but to marketing as well.

What I am hoping for is the ability to understand how social interaction happens in the brain, and how culture influences the brain and its wiring. We already have a good foundation of the core principles, but it will be really exciting to see how this project can build on that.

**Will it bring us closer to an understanding of why behaviour occurs, rather than just allowing us to see what activity is occurring in the brain at any given moment?**

**RD:** The 'why' of behaviour is very difficult to identify by any means. Neuroscience tools can point us in the direction of reasons, though. By noting which areas of the brain are activated during a decision process, one might deduce that fear was a motivator, or pleasure. The new mapping project may help this process become more specific.

**PB:** In my experience, I don't think that any single approach can tell you the 'why' behind the 'what'. But what we find is that you can build a picture of 'why' by putting several pieces of the jigsaw together and looking at things from different perspectives. And we absolutely have to be cognisant of context.

**Genome mapping brought with it fears that humans were trying to play God. Do you think certain groups will be similarly worried about the 'dangers' of BAM?**

**RD:** Some consumers already fear that the use of neuromarketing tools will enable marketers to create ads too powerful for people to resist. That fear is overblown. If creating ads like that were possible, someone would have done it by now – with or without neuroscience. The idea that there might be a 'buy button' in the brain has been a popular concept, but marketers will never find it.

**PB:** Look at the failure rate of new products. It's 80–90%. That's because the consumer is in charge, not the market. The brain is so complex that even processing an image of something as simple as a chair involves 100 brain areas and networks. A single 'buy button' simply cannot exist.

**BRAIN SCAN**



**NEURO INSIGHT CHAIRMAN RICHARD SILBERSTEIN ON THE SECRET OF EFFECTIVE ADS**

Effective ads are emotional ads, according to the Institute of Practitioners in Advertising. So should campaign pre-testing just focus on measuring emotional response? No, says Professor

Richard Silberstein. Emotion plays its part, but to really figure out how effective an ad will be you need to know how memorable it is.

Antonio Damasio's *Descartes' Error* convinced most people that emotions hold huge sway over human thoughts and behaviour and that's why advertising researchers have been pushing for a way to gauge emotional response through neuroscience and other forms of biosensory measurement.

"But emotions are just a means to an end," says Silberstein, who holds a PhD in neurophysiology, "and that end is to get your key message encoded in long-term memory."

Ad research studies by Silberstein and colleagues at Neuro Insight have shown a link between memory encoding and in-market success. What's most important is that memory encoding takes place at the point of branding: that is, when the company logo or web address is displayed.

Steady state topography (SST), a method for measuring brain activity co-developed by Silberstein, can be used to identify the points within an ad at which the memory regions of the brain are most active – with the left-brain storing words and the right-brain holding imagery.

Silberstein's work shows that measures of engagement and emotional intensity correlate most strongly with long-term memory encoding, whereas measures of attention tend to correlate to short-term memory.

That's worth remembering.



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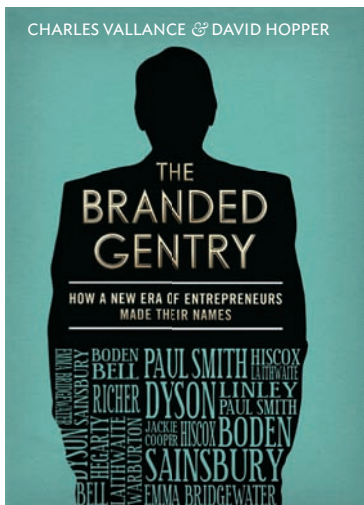
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# Face to face with the Branded Gentry

CHARLES VALLANCE & DAVID HOPPER



**CHARLES VALLANCE AND DAVID HOPPER** HAVE BEEN UP CLOSE AND PERSONAL WITH 13 OF THE BIGGEST NAMES IN BRITISH BUSINESS. SO WHAT CAN WE LEARN FROM THESE LIVING BRANDS?

It can be hard to switch off when you're running a business, especially if it's your own business. You have to give a lot of yourself to make it a success. You have to sacrifice some of your personal life. But what if you have no personal life? What happens when you are your company, and your company is you?

James Dyson, Paul Smith, Johnnie Boden and David Linley are what you might call 'living brands'. Each runs a business that carries their name. Whether it's consumer electronics, fashion or furniture, each is inextricably linked with the work they produce. Ad agency founder Charles Vallance and market research strategist David Hopper have interviewed 13 of these entrepreneurs for their book, *The Branded Gentry* – including the entrepreneurs above, as well as Lord Tim Bell of Bell Pottinger, Robert Hiscox of Hiscox insurers and the ceramics designer Emma Bridgewater.

The book sets out to tell each of their stories, to draw lessons from their experiences and to inspire a new generation of businessmen and women. What the book reveals, however, is how very different the Branded Gentry are from today's crop of company leaders, who like to keep their names one stage removed from the businesses they create.

Brands like Pret a Manger, Virgin and Carphone Warehouse might have identifiable brand personalities but they're not necessarily personalities that they share with their founders. This makes it easier to sell

them – and most companies are built to be sold nowadays.

For a man like Jonathan Warburton, whose eponymous bakery business stretches back five generations, this short-termism is something to lament. Building something, selling it, then moving on isn't in the Branded Gentry's DNA, it seems. Each of Vallance and Hopper's 13 interviewees are doing exactly what they want to do – and they don't want to give it up. And why would they when so much of themselves is invested in their business.

## IN THEIR FOOTSTEPS

Vallance knows a thing or two about what it takes to be a member of the Branded Gentry. His father and uncle built and run Vallances, a chain of electrical retail shops, that lined the Yorkshire Ridings until 1987, when it was sold to Thorn EMI and the shops became part of the Rumbelows chain. Also, Vallance has his name above the door of VCCP, the ad agency he founded with Rooney Carruthers, Adrian Coleman and Ian Priest.

It was while working together on a project for Hiscox that Vallance and Hopper began talking about the notion of eponymity and "what it is about a brand and a person that goes together," says Hopper. Being the researcher, it was Hopper's job to put together an interview structure that would reveal as much about the interviewee as it would about their business. Not that you could separate the two in any case.

Through their interviews, Vallance and Hopper discovered that the Branded Gentry shared several common personality traits. For instance, they all appeared to be very adept at seizing opportunities, whether those opportunities were thrown up by adversity or luck. Take Paul Smith, for example. He was an aspiring cyclist but ended up hospitalised after crashing into the side of a car. While recovering he fell in with a motorcycling crowd who

David Hopper (left) and Charles Vallance hit on the idea for their book while working on a project for Hiscox, the insurer. They wanted to know: 'What is it about a brand and a person that goes together?'





## SUCCESSION PLANS WHAT HAPPENS WHEN IT'S TIME TO RETIRE?

They might think they can go on forever, but sooner or later all members of the Branded Gentry are faced with the difficult task of having to prepare their company for life without them. It is possible, of course, for an eponymous brand to continue without the involvement of its founder – particularly if they have a big family. Warburtons is moving into its sixth generation of family ownership, while Sainsbury's passed through five generations before becoming a PLC.

But what of those brands that don't have a familial safety net to fall back on? "They need a belief system and value system that outlasts the founder," says Vallance. "Some brands will be strong enough to live beyond their founder if they have the right people in place, and those people are sympathetic to what the founder's values were and what their beliefs were."

As for the founders, Vallance says: "There's definitely regret there. Those in our book who are handing over the reins aren't doing it gleefully. All of them feel that their company is an intrinsic part of their lives. And we didn't see any evidence that any of them would be satisfied by leisure."

brought him into contact with a group of art students. The rest is fashion history.

Another common trait, Vallance says, is that "these people aren't the type of characters who want to control everything". He calls them "un-control freaks". "They embrace chaos and they relish the idea of a world full of other chaotic particles like them." To exercise control requires systems, and systems are built to minimise risk – and the Branded Gentry thrives on risk. "They've got a very low boredom threshold," explains Vallance, "and risk and chaos is attractive."

Successful entrepreneurship requires an element of risk-taking, of course. But at the same time, the Branded Gentry are also highly responsible people. The fact that their name is above the door means they're taking ownership of the business – warts and

all. Being your own brand means "every problem is your problem", says Hopper. "You can't delegate it to somebody else. You can't go home and close the door on it." This brings its own set of problems. Vallance says: "A lot of them made themselves ill. About five of them drove themselves too hard."

Several of them also put their faith in the wrong people; people they assumed were like them, with the same principles of honesty and accountability, who ended up "running off with the silver", says Hopper. "But the cost of suspicion is miles greater than the dividend paid by trust," says Vallance. "And the more knocks you take, the tougher you get," adds Hopper.

So what lessons should the next generation of the Branded Gentry learn from today's big hitters? Vallance and Hopper boil it down to five key points:

### 1. **Seize the day**

"These people always have their antennae out, looking for things to get involved in," says Hopper. "So whichever way one of these opportunities hits you, grab it and run with it."

### 2. **Make it personal**

Before putting your name to a company, ask yourself why you want to. "If it's not some form of self-expression, why do it?" asks Vallance.

### 3. **Don't get over-g geared**

"No debts! Never borrow!" Henrik Ibsen's *A Doll's House* could have been written for the Branded Gentry and their dislike of debt, which brings in unwanted outside control. Avoid at all costs.

### 4. **Find someone to support you**

Be it man or woman – or dog, in the case of Johnnie Boden. "I was really amazed at how many of our interviewees had long-term relationships and marriages which were absolutely pivotal to their success," says Vallance.

### 5. **Do interesting things...**

...And interesting things will happen to you. So says John Hegarty. "I've always thought that is a really good way to live your life," says Hopper.

*The Branded Gentry* is published by Elliott & Thompson





# Hello!



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# HAPPY NEVER AFTER

Legendary ad man **Jeremy Bullmore** knows how to get the worst out of a client

A very long time ago, when I was still with an advertising agency, I got thoroughly weary of being asked to make presentations about client/agency relationships. They were all soft stuff – all apple pie and motherhood and close, mutually trusting partnerships. And so to cheer myself up one day, I invented a new client presentation called Ten Tried-and-Trusted Ways to Get the Least from Your Advertising Agency.

## Here are a few of them:

- Keep them feeling insecure
- Employ at least one incompetent, underworked junior
- Never admit to a mistake
- Change your main contact with the agency at least once a year
- Never say thank you
- Never pay for a drink
- Install a highly complex, hierarchical approval system

Each of these techniques was elaborated – the incompetent, underworked junior, for example, should ideally have a slightly ridiculous name such as Beverly, so that the agency could say: “Oh God, Beverly’s in again and wants lunch.”

The reaction of clients to this new-style presentation varied from grudging gratitude to open hostility. Entirely reasonably, many demanded the right to reply – and reply they did. This second presentation, generated entirely by clients, came to be called:

## Ten Tried-and-Trusted Ways of Pissing-off Your Client

- On the day that lack of demand for their product forces them to close a factory, take your client to a black tie awards ceremony where you are presented with an award for your work.
- When you travel with a client, always see them settled comfortably in economy before you yourself go up front.
- When showing an existing client the best examples of your current work, under no circumstances include any work that you’ve done for them. Explain that it’s important for your company’s image to be seen to do mould-breaking work.
- Be sure to leave every client meeting at least once to take another client’s call. On returning, do not fail to comment on



**Jeremy Bullmore** is an MRS Patron, a former chairman of ad agency J Walter Thompson London and author of *Another Bad Day at the Office?*, *More Bull More and Apples*, *Insights and Mad Inventors*. He also writes a regular advice column for *Management Today* and *The Guardian*.

the other client’s courage. You may also find it helpful to mention their generosity in the matter of remuneration.

- Explain to your instant-coffee client that you’re serving real coffee in the meeting because your creative director much prefers it.
- When you hear that your client has just experienced a huge fire in their warehouse, ring to enquire if your budget is safe.
- If your client seems slow to grasp the subtleties of your new proposal, remark: “You seem to be missing the point of this concept. They understood it perfectly well in the groups.”
- Explain the absence of the expected group of directors by saying: “Yes, I know they were on the pitch team, but they’ve got another one this afternoon.”
- Take eight people from your side to the presentation. Make sure that five say absolutely nothing. Then, later that day, ask if you could renegotiate your fee since you’re finding it difficult to break even.
- After the third rejection of a proposal, enquire of the senior client present, and in front of their subordinates: “It would help us to know who in your company actually has authority.”

Though originally devised to help advertising agencies infuriate their clients, I very much hope that these simple yet time-tested insights may also be of help to research agencies in pursuit of the same end. ■

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# Life behind bars



## CV

STEPHEN WEBSTER

### 2010 – present

Head of crime and justice research,  
NatCen Social Research

### 2006 – 2009

Research director and team leader,  
NatCen

### 2005 – 2006

Senior researcher, NatCen Social Research

### 1998 – 2005

Senior research psychologist,  
HM Prison Service

### 1997 – 1998

Psychology assistant, The Wolvercote  
Unit, Horton Hospital

BEING SENT TO PRISON IS ALL PART OF THE JOB FOR CRIME AND JUSTICE RESEARCHER **STEPHEN WEBSTER**

Stephen Webster knows all about hard-to-reach respondents – most of his are locked up. As a former prison psychologist turned crime and justice researcher he's spent plenty of time going in and out of jail, talking to offenders, giving him a unique insight into a world most of us never experience.

His first time in prison was an anxious one, he recalls. It wasn't the prospect of one-to-one work with offenders that had him on edge – Webster had already met plenty while working for a charitable organisation. "It was more just being in this very bizarre environment where it's very controlled, you can't come and go as you please, and there's a lot of noise. People shouting. It's a very different sensory experience," he says.

Being in prison isn't the hardest part of the job, however. Webster specialises in work that seeks to understand and reduce sexual abuse and sexual violence. In his eight years with Her Majesty's Prison Service, Webster led the research, assessment and evaluations of sexual offender treatment programmes. "At the most fundamental level I was providing input into whether these men were changing and writing clinical reports that would have a bearing on whether they could be released."

But to understand offenders requires a detailed understanding of the offences they've committed – which means Webster was, and still is, exposed to some "very challenging things; some very upsetting detail".

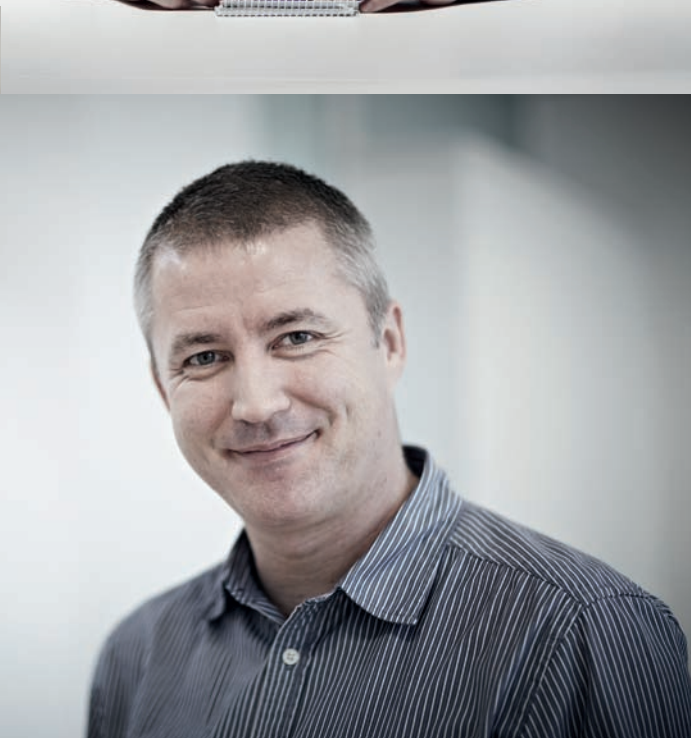
"It can have a big impact on you personally," he says. "You can pay a price for doing some of this work." As a researcher, though, you need to keep yourself on the front foot, Webster says. "It could be quite easy for someone to slip up and not ask the right question because they don't want to hear anything traumatic."

## IN TREATMENT

Webster didn't enter undergraduate education until he was 25. While studying for a degree, he started working with The Lucy Faithfull Foundation, a charity committed to reducing the risk of children being sexually abused. "The foundation had a treatment centre at the time called the Wolvercote Clinic, which was a residential treatment centre for child abusers," explains Webster. "I took a position there as a day worker – in between lectures – and that's where I started to get interested in the forensic aspect of psychology and in the study of sexual and violent offending."

Webster is a chartered psychologist rather than a forensic psychologist, but the term 'forensic psychology' refers to the area of work he does – the study of prison populations, of people with offending histories and of people who are victims of crime.

He joined the Prison Service in 1998 before moving to NatCen Social Research in 2005 as a senior researcher. He's now head of NatCen's crime and justice research team, which studies sexual offending, online crime, victims of crime and substance misuse.



At any one time, the team will have as many as 10 projects on the go, meaning staff are either in prison collecting data, recruiting respondents, setting up community evaluations or analysing and reporting. As the manager, Webster has responsibility for new business development, staff recruitment and P&L. However, he says, "A lot of the work we do is very sensitive. It's not the sort of work that you can just throw people into. So we need to have senior people supervising the application of research.

"But at the same time," he adds, "we are looking to grow our more junior researchers and, because of the work we do, we have an ethical responsibility and a duty of care to develop them in the right ways so they're not exposed to situations that are too difficult or challenging for them to cope with. So myself and two other senior colleagues always need to be on hand to provide supervision."

## THE JOBS MARKET BROADENING HORIZONS

Growing demand for research skills is reshaping the recruitment market, says **Sinead Hasson**



Building a career in research used to be a fairly straight-forward process. Step one: Cut your teeth in an agency. Step two: Move clientside. But the smooth road to career stardom has

buckled somewhat in recent years under the pressure of economic gloom.

Brands that would previously have outsourced projects to an agency have instead opted to build in-house teams, figuring they can do more with less and, at the same time, make insights more integrated. The upshot here is a more competitive jobs market that is making it harder for traditional research agencies to attract the next generation to their ranks.

But that's not the only difference. The evolution of research methods has also had a big impact on those working in the sector. Digital community engagement and social media research now feature heavily in the researcher's toolkit, with the analysis of big data following suit. The flood of data produced by the digital revolution has democratised research, enabling related organisations to feather their nests with their own research offerings.

What does all this mean for ambitious research professionals? Firstly, it's worth noting that not all future employers will know precisely what it is they are looking for. Companies seeking to enhance the research function may know what they want to achieve, but won't necessarily be able to pinpoint the attributes they need to get there. Caution here will pay dividends. Researchers applying for such a post should do so with their eyes open. They will need to be sufficiently confident in their abilities to operate autonomously, as it's unlikely that they will be working with similarly skilled individuals. Mid-ranking agency workers in particular should take heed of this.

My advice to research professionals is to explore your options carefully. Opportunities are opening up in new and exciting sectors, but only those properly equipped with the necessary skills and experience will succeed. A solitary research role in an organisation unfamiliar with the research world will offer you no shelter if a storm comes your way.

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



## THE BIGGER PICTURE

Given the difficult subject matter, Webster says budding crime and justice researchers need to be resilient sorts. "Other than that, I don't think you need to be a certain type of person to do the job. But I think you have to want to do it."

Working with sexual violence and sexual abuse is hard, Webster admits, but it can also be "tremendously rewarding". The key is to focus on the bigger picture, he says. "For me, it's always been about frontline child protection."

He talks with enthusiasm about the European Online Grooming Project that NatCen led for the European Commission, working

with colleagues from Kingston University and academics in Belgium, Italy and Norway. The project involved interviews with 33 online groomers and shed new light on grooming behaviour and the victim selection process. Results are now being fed back into prevention initiatives: those designed to stop would-be offenders, as well as education programmes to help young people recognise the sorts of online behaviours that could put them at risk of grooming.

"If a study we've done on online grooming has influenced one young person to behave differently, or has made one parent sit up and take note of what can occur online, than I think that's been tremendous value for money," says Webster.

## ADVICE LINE

### IF YOU WANT TO FOLLOW IN STEPHEN WEBSTER'S FOOTSTEPS... GET SOME EXPERIENCE

"I know when I started out I was really grateful to have had some exposure to offenders early on. It's one thing studying the subject but it's another thing entirely being in an environment where people are acting out or discussing some really difficult detail. The more experience you get, the more it will help you understand whether this is the right job for you."



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## A WEEK IN THE LIFE

Colleen Fahey-Rush, executive vice president and chief research officer, takes us behind the scenes at Viacom Media Networks, home of Comedy Central, MTV and Nickelodeon

**MONDAY** My week starts with fielding phone calls from reporters. TV ratings firm Nielsen is planning to change its methodology and the journalists want me to comment on what I think of the move. Audiences are well ahead of where measurement is right now – especially our ability to capture how people are watching TV on different devices like tablets – so I think it's good that Nielsen is taking these kinds of steps.

Later I meet with my three main go-to people to discuss the consumer insights projects that we're going to be working on in the next six months. We talk about the priorities that our internal partners have and what help they need.

We work very closely with a variety of departments within Viacom, sitting in their strategy meetings and with their staff so that we can get to know what their priorities are. We shape our research programme based on that. We know that authentication – or what some people refer to as “TV everywhere” – is a big thing at the moment, so we decide to move forward on some research in that area.

**TUESDAY** I head down to a meeting with the Media Rating Council, an independent body that evaluates and audits research measurement here in the US, to talk about problems surrounding the measurement of kids' digital media behaviours. Kids are born into this digital world and they are using all these different devices for fun and to communicate, and while we do loads of research on kids and mobiles, and how kids are consuming content across screens, we don't really think that Nielsen is catching all of these behaviours – especially when it comes to digital. It's difficult because you can't directly survey a kid that's under 13, but it is a major issue for us.

After that I have an executive committee call for CIMM, the Coalition for Innovative Media Measurement. Viacom is a founding member of CIMM and I'm currently the chairman of the executive committee. CIMM's focus is to try and make progress in the area of cross-platform media measurement, so on the call we debate some of our next projects and talk about an event we're going to have in April to help make sure that the whole industry knows about all the good things that we've got going on.

**WEDNESDAY** Every other Wednesday we put together a newsletter to send to people internally to share what we're learning about our audiences. It's a great way to remind everybody of the depth and breadth of research that we have

going on here and to inspire questions from the various teams within the business.

With the newsletter done, it's time to call my counterpart at Unilever to discuss any consumer insights work that we might want to partner on. We have a special relationship with Unilever, which I find very helpful because it helps me to consider research projects through the lens of a major advertiser.

This week also sees the release of a piece of research we've done on connected TVs. I'm shown the presentation for the first time today and it's really interesting. Now that I've seen it, we'll do an internal roadshow with it – bringing it to all the other research teams, as well as the content distribution people, the product people and senior management. We'll try to leverage it as much as possible so that everybody is learning together.

**THURSDAY** Today is my weekly meeting with Tom Dooley, Viacom's COO, to review the dashboard – which is basically a series of reports that we create to share with him how our ratings

are going for all of our channels and what the competitive landscape looks like. I also make sure to have a couple of special deep-dive presentations to walk him through as well.

We do a ton of analysis on how our brands are performing and how our shows are doing and what's happening out there in the media industry. That's what my team does: a lot of heavy lifting around that centralised reporting, and my job is to know everything about everything.

My meeting with the COO only lasts an hour, but I always walk out of there with five more things to do. So the first thing I do when I get back to my desk is try to put those things in motion so that we can keep the information flowing to him.

Then I'm into a meeting with the communications team to discuss a press plan for a new global study that we're working on. We don't know what the results are going to be yet, but we're trying to anticipate what kinds of conferences we might want to take it to.

**FRIDAY** Part of my job is to work closely with senior management to prepare for our quarterly earnings calls – and these have a way of coming around very quickly. We do a mix of broad and granular-level reports and analysis to make sure that senior managers know absolutely everything that they could possibly get asked about during the call. In today's planning meeting, we review the material that we prepared for last quarter and we figure out what we're going to do for the coming one.

Friday also sees me laying the groundwork for the following week. On Monday we're having an offsite meeting for everybody in Viacom Media Networks who works in research. There's a ton of detail and panels and speakers to organise but it will be a great day full of people coming together to learn and hopefully be inspired. And then we'll have a cocktail party. ■







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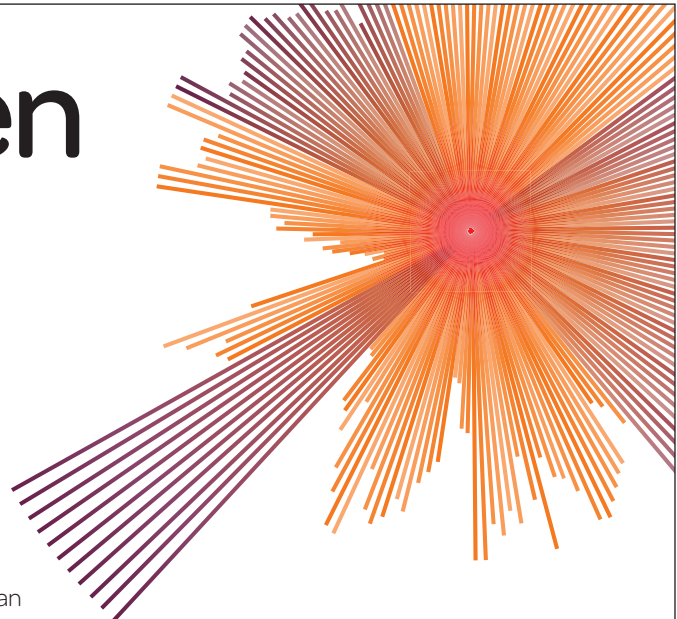
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# FLAGGING REFORMS?



Barry Ryan is director of the MRS Policy Unit

DESPITE FOUR YEARS OF DISCUSSION AND SEVEN COMMITTEE REVIEWS, **BARRY RYAN** EXPLAINS WHY FAILURE REMAINS AN OPTION FOR EUROPE'S PROMISED NEW DATA PROTECTION LAW

Following the passage of legislation through European institutions can be a torturous affair. While the European Commission proposes legislation and the Council of Ministers must agree to its passage, the European Parliament is where the real power lies. Directly elected by the people, the parliament is a model of transparency and accountability – and utterly unpredictable. And this is where the four-year long effort to update Europe's data protection law currently resides.

Ever since the parliament took on the data protection brief, we have had communications, opinions and reports from seven different committees. LIBE, the Committee on Civil Liberties, Justice and Home Affairs, is currently in the driving seat, with German Green MEP Jan Phillip Albrecht responsible for steering the legislation through parliament. The left-leaning Albrecht has his own particular ideas on data protection, uniformity (good) and exemptions (bad). While other committees have taken flak for adopting amendments proposed by industry, Albrecht has a firm 'fundamental rights' line, supported by civil society organisations such as EDRI.

The Greens, however, are a minority party and Albrecht needs the support of others if his version of the LIBE report is to make it to the floor of the parliament. It seems that the Socialists are with him, but it will not be enough. Opposed on the right are the Christian Democrats and Conservatives. In the middle stand the Liberals, and it is their votes that will likely decide the direction the parliament takes.

The Liberals have a diverse composition and the common wisdom is that they will split their votes, making the final outcome uncertain. In the Industry Committee, they voted en bloc with the parties of the right, giving hope to industry. But since then, their leading pro-industry MEP, Alexander Alvaro of Germany, was seriously injured in a car crash, leaving the future direction of the party unclear.

Confusing as all this may be, it is at least playing out in public. Behind closed doors, the Council of Ministers, who must agree with the parliament on any final piece of legislation, are working on their own version.

One snippet of information that has leaked out is that there appears to be a group of 11 countries with enough votes to block the passage of the legislation. This group is opposed to a regulation and would prefer to have

## EURO-SPEAK

### NEW WORDS OVERHEARD IN BRUSSELS

All roads lead to the **trialogue**. This is where the European Parliament and the Council of Ministers hammer out their differences with the assistance of the Commission, attempting to reconcile two versions of one piece of legislation. If you are thinking of some grand committee, think again. It involves three people: an MEP, a civil servant from the member state hosting the Presidency of the Council (currently Ireland), and a representative of the Commission.

## WHAT'S AT STAKE? PROPOSED CHANGES TO KEEP AN EYE ON

### Exemptions for research

Researchers currently have legal access to data that may have been collected for other purposes, subject to certain safeguards. Some are looking to limit this exemption dramatically, requiring consent of individuals before their data could be used to invite them to participate in research, for example – thus creating a “consent for consent” problem.

### A ban on profiling

Intended to limit online behavioural advertising, the revisions have been expansively worded to encompass any automatic processing, including statistical processes used in sampling.

### Administrative burdens

New requirements to retain German-style independent data protection officers and to obtain prior authorisation from national regulators for certain classes of data processing would mean an end to the general requirement to notify regulators of data processing.

a directive, which would allow for national legislation on data protection to continue. The 11 do not hold this position for the same reasons, however, so we do not know how strong the alliance will be. The UK, for example, opposes a regulation because it is too strict and burdensome; Germany because it is not strict enough. Failure remains an option then. With a new parliament and commission due mid-2014, the data protection law must be agreed by the end of 2013 if it is to have any chance of success. ■

## WHAT MRS IS DOING

Uncertain as all this may be, it is essential that research makes its voice heard. That's why, since 2009, MRS has taken a lead role in the public affairs work of EFAMRO. EFAMRO represents 16 European research markets, of which the UK is the largest. In the EU we work closely with Esomar, meeting Commission officials and MEPs to ensure that the value and importance of research is clearly understood. In parallel, MRS is in close contact with the ICO and the Ministry of Justice, to shape the UK's negotiating position in the Council of Ministers.



## Detail with passion

The first issue of Impact comes at a time of the year known to MRS staff as 'AC' – After Conference. It's when we at MRS pick up the pieces following several months of preparation for this momentous event, dust ourselves off, and try to resume something resembling normal life.

This section of the magazine covers the big MRS news stories that you may have missed, as well interesting or unusual new offerings from MRS – including training, networks, content and other benefits.

You will be hearing a lot about our Fair Data 'trust mark' in future, so this time we have given procurement and international matters pride of place.

Members and company partners often ask me what we are doing to help them expand their international network or protect their business. This is the type of work that MRS does on a daily basis and is absolutely critical to the growth of the industry.

So in celebrating the Global Research Business Network's first birthday we are continuing to build an international dimension to the Society's mission.

P.S. Don't forget to read my blog at [mrs.org.uk/blog](http://mrs.org.uk/blog) – and don't hesitate to post your comments and feedback.

Jane Frost CBE, CEO of the Market Research Society



# MY SOCIETY

## The business of buying Creating a pan-government social, economic and market research framework

In its October report, *Improving Market Research Procurement*, MRS recommendations to government centred on cost reduction measures, reduced bureaucracy and improved value for money. Support for SMEs was paramount.

Since then there has been a fundamental broadening in scope within government. Originally the focus was replacing the old COI framework. Now a pan-government framework, encompassing not just market research but social and economic research too, is being considered. Leading the activity is the Research Council UK Shared Services Centre (RCUK) in alliance with the Government Procurement Service (GPS).

### What does this mean?

- Should no new framework be in place by December 2013 it is likely that the former COI arrangements may have to be extended – departmental frameworks will still be used.
- A combined framework is unlikely to be good for research as generally government market research is quite different from social and economic research; and fewer suppliers overall would in all likelihood be selected if there was one framework instead of two.
- MRS is working with the RCUK and GPS, together with the Social

Research Association, in assessing the impact of this potential change. MRS has been invited to draft an updated report, to be published later in the Spring.

## Connecting you to the global research market

Since its launch last year the Global Research Business Network (GRBN) has increased its membership from 25 to 37 national associations, connecting more than 3,500 research businesses – 85% of the global research market. This year EFAMRO, the European Research Federation, developed a comparison of the research codes and rules used when conducting research in different territories. You can find this at [mrs.org.uk/codecomparison](http://mrs.org.uk/codecomparison)

## A guide to buying research

MRS's Procurement Initiative Team (PIT) has developed a framework for researching what good practice looks like in buying research. The framework and points of interest will be posted on the MRS website. If you are interested in contributing please email Martin Cary, PIT team leader, at [martin.cary@illuminas-global.com](mailto:martin.cary@illuminas-global.com).

## VAT levy for research suppliers

From 1 August 2013, all business suppliers of research will be subject to the standard 20% VAT rate. MRS has requested that transitional arrangements be put in place until 2016 to protect longitudinal projects set up before the announcement, and that HMRC issue further guidance on



how out-of-scope non-business research is defined to ensure that VAT is handled correctly by affected universities and charities.

### MRS elections 2013

Richard Silman, CEO of global media at Ipsos MORI, takes up his new role as chair designate on the MRS Main Board effective April 2013. He will become chair on completion of Phyllis MacFarlane's term in April 2014. Also elected to the board are Geoff Gosling (independent consultant), Raz Khan (Cobalt Sky) and Debbie Preston (Halfords).



### Restoring consumer trust

On 28 January MRS launched a new ethical mark for personal data use. The mark, Fair Data, means that members of the public will easily be able to differentiate between those organisations that collect, use and retain personal data properly and ethically, and those that do not. The mark has support from politicians, industry figures and partner organisations including GfK, Lil-Lets and PwC. MRS is also in discussions with a number of consumer organisations about how they can become Fair Data companies.

### Fair Data comment



"Consumers are losing trust in businesses because of the way they feel their data is being abused."  
Clive Humby, H&D Ventures



"Companies that can say 'we are accountable' are the ones that will win out." Christopher Graham, Information Commissioner



"Consumers need guarantees that the information they give is not going to be misused – that's Fair Data." Jack Straw, MP

For more information, including video endorsements from a range of figures, go to [www.fairdata.org.uk](http://www.fairdata.org.uk) or email [fairdata@mrs.org.uk](mailto:fairdata@mrs.org.uk).

## Don't miss!

**New member content on [mrs.org.uk/myMRS](http://mrs.org.uk/myMRS)**

Video interview – with Simon Rogers, editor of [guardian.co.uk/data](http://guardian.co.uk/data)

Awards showcase – best submissions for Awards 2012.

A-Z of research terms – from Animatics to Z Test.

# Calendar

## Member events

### May

13 – Best Advice Ever, R-Net young researchers network, London

14 – The Power of Cultural Insights, member evening, London

### June

6 – MRS Scotland AGM & Quiz, Edinburgh

11 – MRS Fellows Lunch, London

17 – Confessions of a Researcher, member evening, London

### July 2013

8 – Shopping isn't Simple, member evening, London

25 – MRS Summer Party, London.

To submit an idea for a member event please contact Michelle Denslow on +44(0)20 7566 1871 or [michelle.denslow@mrs.org.uk](mailto:michelle.denslow@mrs.org.uk)

## Training highlights

### Advanced Qualitative Practice

17, 24, 31 May and 7, 14 June

Five modules covering psychology, facilitation and paths to insight, come together in a challenging and very practical programme.

### Mission 88

17 May (and three further 'missions')

Training just for client researchers to understand and exploit their role in the business.

### Unlock the Story:

**Commercial Storytelling for Researchers**

16 May (Part 1) and 7 June (Part 2)

This training is designed to accelerate capabilities in commercial thinking to access and influence business decisions.

### Research Masterclass

MRS Summer School – 18-20 June

Develop more advanced research skills and a keener business/commercial awareness.

**This is a small selection from more than 30 training events from May to July.**

**Full programme at [mrs.org.uk/training](http://mrs.org.uk/training)**

## One-day conferences

Our 2013 programme of one-day conferences was being finalised as we went to press. They will be announced shortly at [www.mrs.org.uk/events](http://www.mrs.org.uk/events)

# Where next?

You've reached the end of *Impact* but there's still plenty more original content to enjoy from the MRS stable, including Research-live.com and *IJMR*.

## VIDEO

### What should organisations do to build trust?

Simon Milner, director of policy for Facebook UK and Ireland, answers some quick-fire questions about privacy, regulation and the potential of big data.  
[bit.ly/11hGzn7](http://bit.ly/11hGzn7)

### Relive the shock of the new

The full hour-long MRS Annual Conference keynote debate is now available online. Featuring M&C Saatchi's Camilla Harrison, former BBC1 controller Lorraine Heggessey and broadcaster Justin Webb.  
[bit.ly/11hGgJ8](http://bit.ly/11hGgJ8)



## RESEARCH-LIVE.COM

### Look-a-Likes

GfK's Colin Strong says work by Cambridge University to tie Facebook Likes to personal attributes could be a pivotal moment for the Smart Data movement.  
[bit.ly/X4Ovf](http://bit.ly/X4Ovf)

### Saving the high street

Investment is only half the solution to the high street's problems, says Peter Shreeve. What's needed is a different

approach to measuring and sharing shopper opinion.  
[bit.ly/11RXknP](http://bit.ly/11RXknP)

### A degree of study for social media research

Professor Christian Fuchs explains why the University of Westminster's new Centre for Social Media Research is 'necessary, timely and the right thing to do'.  
[bit.ly/XbfqOr](http://bit.ly/XbfqOr)

## IJMR

### Are we data rich but knowledge poor?

*IJMR* editor-in-chief Peter Mouncey says companies are struggling to manage the mountain of information available to them today and to extract value that leads to real, and sustained, competitive advantage.  
[bit.ly/13tc55q](http://bit.ly/13tc55q)

### Market research and the ethics of big data

In a 'digital first' paper, Daniel Nunan and MariaLaura Di Domenico explore the key perspectives underlying the emergence of big data, and consider both the opportunities and ethical challenges raised for market research.  
[bit.ly/YLpQE3](http://bit.ly/YLpQE3)

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