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ISSUE 12 JAN 2016

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**From the birth of qual to the rise of big data
celebrating 70 years of market research**

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The big 70



Jane Bainbridge
Editor

Roll up, roll up for the magical mystery tour, step right this way. Welcome to the review of 70 years of investigating, exploring and overcoming the mystery of what people do and why they do it. Seventy years of research, learning, evidence-collecting, application and innovation.

To celebrate the Market Research Society's (MRS) 70th anniversary we have invited the great and the good of the profession – Edwina Dunn, Eric Salama, Sir Martin Sorrell and Peter York, to name but a few – to share what for them are the standout, game-changing moments in market research since the mid-1940s (p 26).

During that time, some aspects of market research have changed irrevocably, while others remain strangely familiar – despite the intervening years – as demonstrated in Adam Phillips' article describing the shock election result of 1945 and how most pollsters failed to predict the downfall of Winston Churchill and the Labour landslide. The parties may have swapped, and polling become more sophisticated, but challenges remain, as we saw only too well in the 2015 General Election.

However, throughout the 70 years, the techniques and methodologies, the technology and media, have all evolved, so the toolkit on offer to this generation of researchers can provide the richest of insight. Our industry's own particular mystery tour has brought us the birth of qual; the development of survey methodology; socio-economic classifications;

media measurement; ethnography, behavioural economics; and so on.

The concept of disruption has moved from the classroom to the computer and disruptive technologies are not only changing the pecking order of the world's most powerful brands, they are providing data on the minutiae of our lives in previously unimaginable ways.

Data has become big, time is now real, media is social and everything is smart. But although the changes have been significant, so too have been the constants. Brands are still essentially trying to uncover why people buy the products that they do and good quality statistics and evidence-based research will still educate and influence policy-makers.

And, while it's always enjoyable to look back and indulge in a spot of nostalgia, an anniversary should also be a springboard to look forward – to see where customer behaviour and insight will take us in the future. There are still many more human behaviour mysteries to be solved.

So step aboard, the magical mystery tour is waiting to take you away...

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Impact is free to MRS members.
Subs: UK £50pa, overseas £60pa

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All content in *Impact* is editorially independent of any sponsor involvement.

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Will Amlot



Amlot photographed David Halpern for our Profile piece on p20, as well as a number of our Special Report contributors p26. willamlot.com

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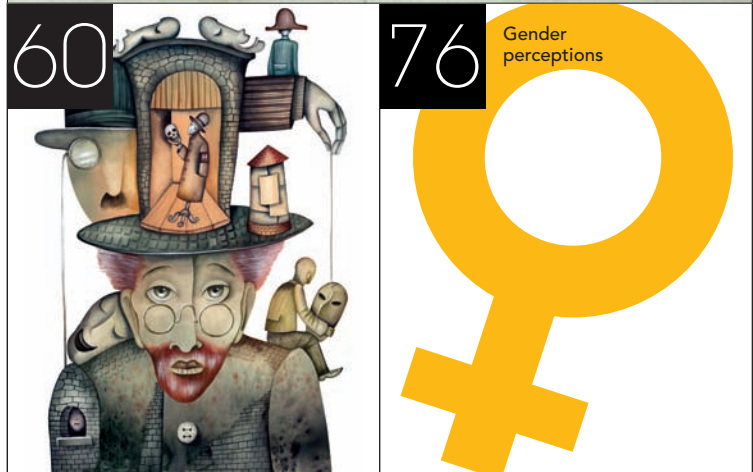
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Rob Gray

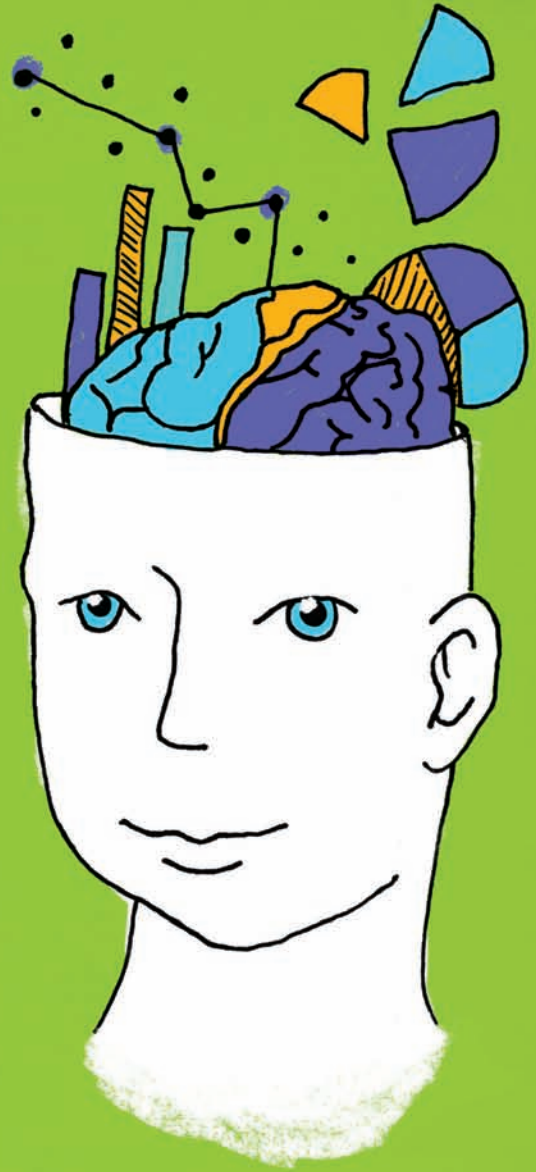


Gray, a journalist and author, interviewed Unruly's insight director, Ian Forrester, as the firm adapts to ownership by News Corp p40.

MULTI
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The division of attention

Adam Smith's theory on the division of labour first appeared in 1776, in the *Wealth of Nations*. The idea was later revived by The Coasters in their late-50s B-side *My Baby Comes to Me*.

**Well, she go to see the baker when she wants some cake
She go to see the butcher when she wants a steak
She go to see the doctor when she's got a cold
She go to see the gypsy when she wants her fortune told**

**But when she wants good loving my baby comes to me
When she wants good loving my baby comes to me.**

As the song suggests, rather than dividing his efforts between the supply of cake and fortune-telling, the baker would do better to concentrate on the former. Similarly, the doctor is better off not diversifying into the provision of 'good loving' and leaving that market niche to the narrator, who seems to enjoy a healthy competitive advantage.

What is interesting about the division of labour is not just that it works, but that it works in many different ways.

It arises from the simple insight that 10 people, each concentrating on one task, will do a better job than 10 people dividing their time between all 10 tasks. But it also works in other domains.

A butcher can stock a far greater range of meats if his storefront is not cluttered with cakes. On a trust level, meanwhile, a fishmonger will suffer more reputational damage from selling poor fish than a general retailer.



“If you spend only 5% of your time screwing legs on chairs, it's not worth inventing an electric screwdriver”

The interesting thing about the division of labour is that it isn't all about labour at all; it's also about the division of attention, of reputation, of expectation and of trust.

Perhaps the most important effect of the division of labour is the division of attention, and the effect it has on innovation. If you spend only 5% of your time screwing legs on chairs, it's not worth inventing an electric screwdriver. If you spend 100% of your time screwing legs on chairs, you dream of nothing else.

Someone who buys something once a year is much less likely to help you innovate or improve

your product than someone who uses it frequently. And something that occupies only 0.00001% of your attention is less likely to prompt thoughts of improvement than something that occupies 1% of your attention.

You have to be careful here, obviously. Frequent flyers are very different from infrequent holiday-makers in terms of what they want from an airline or a hotel. However, there is one area in which the frequent users will be disproportionately valuable – in removing irritating aspects from a user experience.

As an example, let me give you several things that drove me nuts when I was a frequent traveller: the hotel practice of trying to take your bags before you had checked in – which I found deeply alarming; completely inconsistent and incomprehensible shower controls; and inefficient queuing systems for the x-ray machines.

Such experiences probably arouse negative emotions in everyone who travels. The difference is that infrequent travellers are much less likely to give voice to their irritation. Something that irks you 20 times a year is perhaps 200 times more irritating than something you only encounter once.

A friend of mine is a great believer in specialist research among unusual users.

When he wanted to look for innovations in corn plasters, he recruited a group of dominatrixes. There is no group more eager to help you find solutions to the pain of spending hours in incredibly uncomfortable shoes. ■

Rory Sutherland is vice-chairman, Ogilvy & Mather UK



Canada – p14
Peer-generated product reviews are well established, but now people can review each other, thanks to a new breed of apps – and it's causing some controversy.



UK – p16
Surveys can't be relied upon to give a full picture of digital behaviour, so this is where passive measurement techniques come in, says Ian Ralph, of Marketing Sciences Unlimited.



Africa – p15
African markets are ripe with opportunity, but market research can be logistically difficult if you don't have previous experience. Louisa Kiwana, of MRX Africa, offers some tips for smooth fieldwork.



Global briefing

News, views and insight from around the world – from the market opportunities in Iran to controversial people review apps in Canada. Edited by **Bronwen Morgan**

Slovenia – p18

Academics have created a mathematical model to calculate the optimal size of groups for crowdsourcing problems effectively, but is more always merrier?



Iran – p10

After years of sanctions, will Iranians want to buy Western goods? Following the announcement that Iran's trade sanctions could soon be lifted, On Device Research's Imogen Jones discusses the market's potential for businesses and researchers.



Asia – p12

Emma Gage, of Flamingo, explains why brands must think and act like explorers if they are to take advantage of opportunities in 'pre-emerging' markets such as Sri Lanka and Myanmar.





IRAN:
**After the
sanctions**

Since the announcement, in July last year, that Iran's trade sanctions could soon be lifted, many Western companies have shown increasing interest in the market. **Imogen Jones**, of On Device Research, discusses the potential for businesses and researchers

Traditional market research methods are often not suited to emerging markets, where infrastructure, geography or logistics can be challenging. On Device Research, however, has found that mobile surveys allow access to hard-to-reach demographics in some of the most exciting and fast-growing markets in the world.

Of these, Iran might be one of the most intriguing. With a population of 80 million – 60% of which is under 30 years old – and a gross domestic product (GDP) per capita of almost \$5,000, it's certainly a market with enormous potential. Years of sanctions have kept Iran at arm's length, but since the announcement, in July 2015, of a move towards lifting these, Western companies have shown increasing interest in expanding into this new market and conducting mobile research there.

We conducted a survey to find out how Iranian consumers feel about the sanctions being lifted, and what their attitudes might be to the arrival of Western goods and products in their shops.

Despite its years of isolation, Iran is a connected country in many ways: 60% of its population are avid internet users, and it is estimated that as many as 30m are smartphone

owners. For this reason, mobile surveys work particularly well, allowing quick access to the opinions of a wide range of the population. On Device Research surveyed 1,000 nationally representative Iranians in Farsi, and discovered that this is an incredibly aspirational society, ready to welcome Western goods with open arms and open wallets.

What might be surprising, given Iran's reputation for distrusting the West, is that seven out of 10 respondents reported being interested in buying imported goods. Cars are the most desired foreign product, followed closely by personal electronics and home appliances.

This enthusiasm for imported goods may be driven by the fact that Iranians perceive Western goods to be of high quality, with more than 80% rating German, US, UK and Japanese products as very good. This contrasts with a general perception that goods from emerging Asian markets represent poor quality. Consider, for example, that 48% are interested in iPhones, while only 8% desire a smartphone by Huawei, a Chinese manufacturer.

"A lot of people think China and India have one up on the rest of the world because they are already exporting goods to Iran, but that's not the case," said Alistair Hill, CEO and co-founder of On Device Research. "Consumers are really interested in purchasing goods that have perceived quality and have a lot of research and development behind them. The idea of being able to purchase a Western car – perhaps a German car – really captures their interest."

It seems Iranians are generally positive about this opening up to the West and 83% of respondents believed that the removal of sanctions will have an impact on their lives. One third stated this will result in more opportunities for study or career development, bring

prices down and make them feel more connected to the rest of the world. The survey also found that an enormous 96% of respondents were interested in travelling to foreign countries – with the US rated the most popular destination – while 58% reported they would be interested in working for foreign companies, with the US again the most favoured destination. Far from matching the American-hating stereotype often featured in Western media, it seems Iranians have more ambitious, open-minded attitudes, focused on status and success. Survey respondents reported that being wealthy, and having a good social status and an enjoyable lifestyle are important to them.

Clearly this is a society in which aspiration thrives: 68% would like to start their own business and 36% aspire to be wealthy, compared with a mere 20% of respondents in an equivalent US survey.

Ali Ansari, professor of Iranian history at the University of St Andrews, Scotland, believes the results show the reality of Iran as a cosmopolitan society – much more open to the rest of the world than we might expect.

"Contrary to popular perceptions, they [Iranians] lean heavily towards the West in their search for, and acquisition of, goods and services," Ansari says. "Revolutionary ideology is anti-American and anti-British, but – in popular ideology – [Iranians] don't see them as universally evil. This survey offers a little light into that emotion."

"It seems that – 35 years after a revolution that was intended to limit the penetration of Western policy and culture – that culture, at least, appears all too irresistible."

It's clear that these are exciting times for Iran and, thanks to the insights provided by surveys such as this one, Western companies with an eye on expansion can be confident that their arrival will be met with enthusiasm by consumers.

Conducting research via mobile allows a unique reach into the minds and pockets of consumers in a country that has often seemed impenetrable. Perhaps the next step for Western companies is to consider how best to build on this interest and consumer goodwill, with effective strategies for entering the market once sanctions have finally eased.

Imogen Jones is marketing manager of On Device Research

ASIA



Navigating the new frontiers

Pre-emerging markets such as Myanmar and Sri Lanka represent opportunities for brands to secure first-mover advantages – but they must think like explorers if they are to succeed in their big adventure, says **Emma Gage** of Flamingo

There's a lot of buzz around the south-east Asian new kids on the block: the 'new frontier' markets of Bangladesh, Cambodia, Laos, Myanmar and Sri Lanka – and sometimes the rural geographies of developing countries such as Indonesia, the Philippines and Vietnam.

These markets are growing fast: birth rates are high and the demographic profiles skew young. To put that into perspective, there were more babies born in Laos last year than in the Netherlands – a country more than twice as populous.

Although many in these countries still have limited disposable income, economic growth is strong. Rapid urbanisation, poverty reduction and the establishment of modern retailing formats are supporting sales of a wide range of consumer goods where previously there were none.

For brands, the lure of these virgin territories is strong. There's a chance for brand owners to secure first-mover advantages and to pick

the low-hanging fruit that they hope will be waiting. The potential is very real – but low-hanging fruit it is not. This is where the 'new frontiers' moniker is most apt; brand owners need to think like explorers – training hard and putting in the groundwork before embarking on the big adventure – and, like economists, taking the long view.

These markets are not an homogenous group and they aren't simply less-developed versions of markets such as urban Thailand or Indonesia. Such thinking assumes that the trajectory of growth and development will be consistent or predictable, which isn't always the case. These markets are all unique and culturally nuanced, and lives are built around distinctive beliefs and influences.

Building a 'cultural road map' is an important starting point and helps to establish a context for everything else you learn and do.

Belief system

Looking back at how a country has developed – economically, politically and socially – and understanding the foundational values and belief systems begins to paint a picture of the future trajectory of change. Although consumer insight is nearly always the cornerstone, in countries such as Cambodia and Myanmar – where change is rapid in every aspect of life – the insights might expire sooner than we think.

It's these bigger cultural forces that are the best determinants of the next five, 10 or 20 years. A



good example comes from the work Flamingo has done in Myanmar. The received wisdom on developing markets is that global brands and products enter a country via the key cities before trickling down to lower tiers. Aspiration is consistent, with the only differences coming in the level of access.

However, such wisdom is highly problematic in a market such as Myanmar where, because the population is hugely diverse in terms of ethnicity, religion and language, beliefs shape lives. Physical geography plays a role here too. It is the most populous cities, Yangon and Mandalay, that are at the forefront of change – with the greatest access to the slew of new global brands – but this has more to do with their strategic geographic positions than anything

else. Patheingyi, despite being one of the more populous cities in the country, is enclosed by a mountain range and so is a singularly insular market, almost solely reliant on local products. Mawlamyaing and Monywa share borders with Thailand and India respectively, and this means there has always been a thriving black market from the neighbouring countries. The population is very used to foreign brands, be they genuine or counterfeit.

In economies such as these, it's largely true that people's experiences of brands are much more to do with tangible, functional aspects than the abstracts we take for granted in the West. Thinking culturally helps to frame communication challenges and gives brand owners a better chance of putting into place mechanisms that can really create relevance and drive growth.

Getting under the skin

Generating actionable consumer insight can be a challenge in these environments. It's endlessly fascinating and you'll always learn, but it is tough genuinely to get under the skin of consumer motivations.

These marketplaces are under-developed; many products or categories are immature or non-existent; and, of course, the concept of brand – as we in the West understand it – is embryonic at best. Added to that, deeply collectivist social structures mean it's the wider ecosystem, and not just the individual, that needs to be understood. We need to think about the motivations of the group and the role played by different influences and influencers, including authority figures – who could come in the shape of family or village elders, religious leaders or professionals in the community.

We have witnessed family doctors in Myanmar extolling the supposed benefits of malted dairy drink Ovaltine as a replacement for breast milk and as a medicine for the sick and dying. We've met monks with the power to make or break products and brands, based on superstitious tales and conjecture. These kinds of widely believed associations are tough to break down.

Aspiration is a powerful lever – especially for mums determined to set their children up for the fast-moving future – but, in the main, they are terrified of making bad decisions, so will always defer to elders or advisers. It's

crucial for brands to understand these networks of influence and these tensions – and it's crucial for researchers to look out for these cultural conditions. This often means putting a focus on observation rather than questioning; getting respondents to interview peers or capturing behaviours on our behalf.

When engaging with people directly, we have to minimise our own potential effect as authority figures. If this isn't managed, it can (at worst) deliver a completely inaccurate picture. Building up a rapport with research participants beforehand, using peer-to-peer recruitment and informal locations for discussions, and being sensitive to the profile of the group help to offset these problems.

Think like a start-up

This is the area that can be most unsettling for brand owners. Maybe there are no category norms to push against – your category may not even exist. If your globally agreed brand essence has no relevance, it will mean starting from scratch.

Organisations that thrive in this kind of environment think like start-ups: they are open to spotting opportunities in new categories; to rethinking the purpose and positioning of their brand; and, most importantly, their eyes are always open. They don't just think about where consumers are today; they also plan for growing aspiration. They are thinking about the longer-term development of their brand and business, but are also open to spotting the more pragmatic quick-win opportunities that emerge along the way.

Emma Gage is managing director at Flamingo Singapore

CANADA

Mates' rates

Peer-generated product reviews can provide reassurance for prospective buyers, but a new breed of apps suggests there could also be a market for reviews of people. **By Bronwen Morgan**

Word-of-mouth recommendations are invaluable for brands. According to research by the Word of Mouth Marketing Association, 13% of all sales are driven by word of mouth – a marketplace impact of around \$6 million – while research from Forbes revealed that 81% of consumers are influenced in their purchase decisions by online posts from friends and family.

In fact, many people these days are reluctant to see, do, or purchase anything without first reading what other people have to say about it. And new app people, alongside others, is hoping to extend this to the 'real' world – by allowing you to assign ratings and reviews of one to five stars to everyone you know.

According to the app's website, people allows its users to provide recommendations on everyone they come into contact with – personally, professionally and romantically, as well as allowing users to be recommended themselves. "We want character to be a new form of currency," the Canadian founders, Nicole McCullough and Julia Cordray, claim.

"Once armed with these recommendations, you can turn them into your new form of currency to get better job opportunities, dates and networking opportunities," the explanation on the app's website reads. "The online social media space was lacking a safe

place to manage your online reputation. We are confident that with people you will have it all." Cordray, whose background is in marketing and recruitment, believes this is a good way for people to showcase their character. McCullough, a mother of two, wanted to create something that would help her to decide who she could trust with her children.

The app is still in its beta testing phase but has come under significant criticism; it has been branded as the 'Yelp for people' and an article in *The Washington Post* criticised Cordray for not having "shed light on certain very critical issues, such as consent and bias, accuracy, and the fundamental wrongness of assigning a number value to a person".

Other criticism levelled at the app included fears that it created the potential for people to be defamed quickly and easily – negative reviews were initially going to be live for at least 48 hours before they could be refuted, but this feature has since been revised so no time limit exists, and reviews cannot be

made visible unless approved by the person being rated.

Despite the backlash, people isn't the only app in this genre. Dating app The Grade lets users' matches – as well as people they know in real life – leave reviews on their dating profiles, and membership is revoked if they fail to meet the app's standards.

More sinister is 'gossip app' The Know, which allows people to connect anonymously for the sole purpose of talking about someone they both know. The app's users can type in up to 20 pieces of another person's personal information, including full name, phone number, age, where they live, where they work, and make and model of their car. If another user has entered the same data, the two users are connected anonymously and can message each other.

In the era of quantified self, perhaps quantifying others is the next logical step.





Market research in Africa holds the key to unlocking many commercial opportunities, but there are a number of logistical issues to bear in mind when planning activities there. By **Bronwen Morgan**

A land of promise

The African continent – home to 1.1 billion people – holds great promise for brands and businesses, but the diversity across its consumers and markets is staggering, making a pan-African marketing strategy a complex affair.

Half of all household spending in Sub-Saharan Africa goes to consumer-packaged goods, according to figures from Nielsen, so there are clear opportunities for those that can understand and navigate the marketplace. But gaining that understanding can represent a challenge in itself. Qualitative and quantitative market research are both carried out regularly across the continent but, as Louisa Kiwana, founder of specialist African marketing and research agency MRX Africa, explains, there are a number of important things to bear in mind.

“Africa’s consumer-facing industries represent the continent’s largest business opportunity,” says Kiwana, “but many companies don’t know how to translate this opportunity into action, and the lack of market research done and shared across the continent doesn’t help.”

Kiwana stresses the importance of not treating Africa as an homogenous group of markets and consumers – a stumbling block for many marketers in the past. But while cultural considerations such as this are of clear importance, there are also a number of practical aspects to carrying out market research in Africa that must be taken into account.

Infrastructure

Expect problems when travelling to and

around the region: plane delays; road disruptions; bad roads; traffic congestion; fuel scarcity; and so on.

Internet

Don’t expect good internet access outside of key cities and, even then, don’t rely on it. Limit your dependence on emails and chat applications that require data. Stick to calls and text messages with fieldwork teams.

Power supply

Plan around inconsistent power supply and blackouts, and ask/check for back-up power supply when conducting focus groups and in-depth interviews – or arrange to have your own.

Security

Make sure you get as many second, third and fourth opinions as possible about any new region you are working in; have someone on the ground who can assure you that the site you’re working on is safe, particularly around political/election periods.

Skilled agents

The majority of researchers are client-side, so it can be difficult to find a long-serving agency-side

researcher, purely as agency-side is less of a secure occupation. Go by recommendations and source your experts carefully.

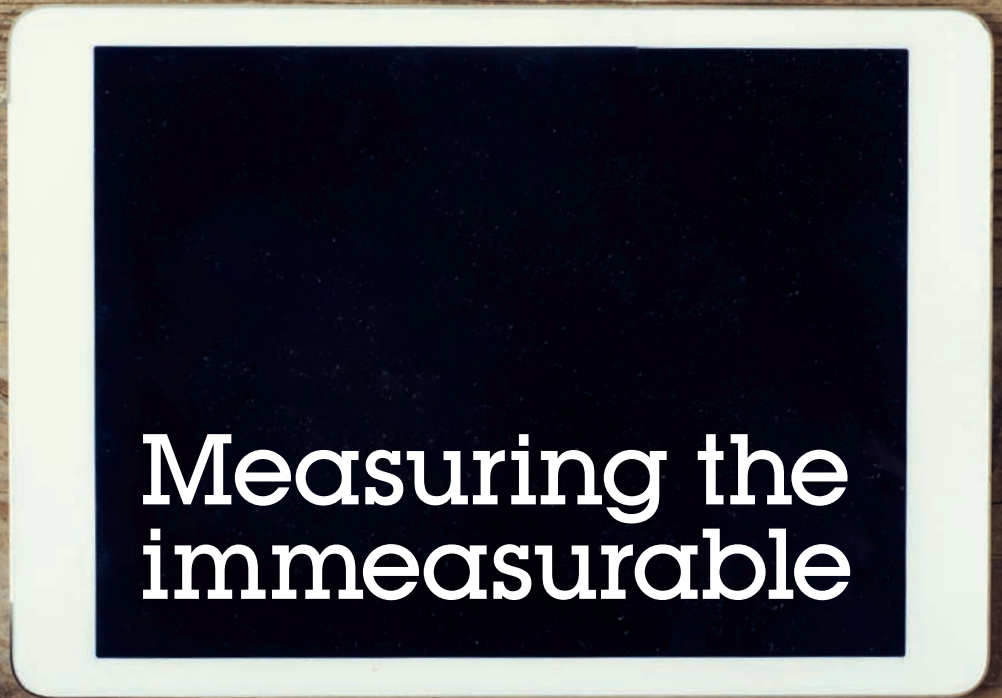
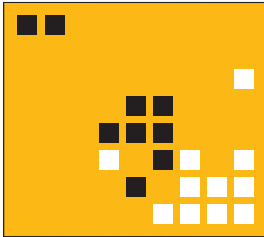
Ethics

Don’t assume field agents think about best practice the way you do – be clear about your expectations on both ethics and compliance. Go over the MRS Code of Conduct as often as you need, to avoid jeopardising the integrity of your project/client research.

“As this untapped market captures global attention, it also offers marketers a chance to leapfrog the legacy of mass marketing that we’ve all been a part of, and reinvent our practices in developing markets from the ground up,” says Kiwana. “We believe that the first steps to market research don’t have to be expensive and time-consuming – just well thought out, appropriate and approached with a fresh perspective.”

As long as it is carried out with this in mind, Kiwana believes that the African market and its consumers can provide “the perfect laboratory for innovation in market research”.

UK



A new passive metering technology that records all of an individual's digital activity is shedding some interesting light on the difference between what people think they do online, and what they really do. By **Ian Ralph**

Digital devices are ingrained in the very fabric of our daily lives. We have all read the headlines about how completely we rely on our devices these days, with those terrifying statistics about how many of us sleep with our phones or check Facebook while on the toilet. In theory, there is a wealth of digital information there for the taking by market researchers – information that would be invaluable to brands. It's accessing such data that is the tricky part.

With behaviour that has become so habitual, pure recall through an online survey can't give us the full picture. Then there's the problem of accidental misreporting by those groups who aren't so comfortable with technology. We also have the thorny issue of whether we want to tell anybody – even an anonymous online survey – about some of our more awkward or embarrassing online activity.

We do still need traditional surveys to understand why people do things and how it makes them feel. But where the usefulness



of this technique ends is where the benefits of passive measurement begin.

Reflected Life, an insight tool from ICM Unlimited and Marketing Sciences Unlimited, uses passive metering technology in the form of an app to monitor digital activity continually on a range of devices across a panel of 2,000 UK consumers.

The app is loaded onto any device a panel member owns, including PCs, laptops, tablets and smartphones, and then runs unobtrusively in the background.

The tool monitors all activities on those devices – websites visited, apps, device features used – and collates the information to give a complete picture of an individual's life online. This is then combined with personal background information and survey results to help brands understand exactly how their customers make decisions online.

Social media addicts?

When we compared traditional survey data with that collected through Reflected Life, we found that consumers were pretty good at recalling what websites and apps they had used. Where the average person falls down is remembering how they used them.

Despite the slightly guilty expression with which most people discuss their social media use, we actually found that most were over-estimating the length of time spent on these apps. The reality is that people use social media in much shorter bursts than they claim to, dipping in and out throughout the day rather than staying in one app for a long time.

For example, the regular UK Facebook user thinks their average session length is about 17 minutes. The truth is that it's closer to three minutes long – we forget about all those furtive checks under the restaurant table or the irresistible glance at every notification 'bleep'. And, despite the strong conviction of the UK public that we use our smartphones primarily during the day and early evening, Reflected Life shows that 14% of YouTube app use happens between midnight and 5am. That's a lot of humorous cat clips while a partner sleeps. The stark differences between actual and claimed behaviour clearly have huge implications for how brands market their products online.

For example, a leading retail bank wanted to understand better each customer's online journey when taking out a loan.

We combined qualitative interviews with passive measurement techniques to work out

which search terms, websites and apps consumers were using to identify the right product for them, and in what order. By looking at individual loan journeys we were able to see how varying online sources were used together at different stages of the process, and how this varied from person to person. We discovered that most people start with a basic Google search, followed by checking a credible information source, such as moneysavingexpert.com. So far, so predictable.

However, we found that the journey from that point to the lenders' own sites varied depending on the level of previous loan experience, complexity of the application – such as credit rating – and the urgency of the loan. We also worked out that the majority of these journeys took place either very early in the morning or late at night when people were at home and able to sit at their device alone.

This insight is helping the bank position itself correctly within the digital world and ensuring that its media investment is geared for maximum impact, unhindered by the disparity between actual and claimed behaviour that has dogged market research for so long.

Ian Ralph is a director at Marketing Sciences Unlimited

SLOVENIA



Size matters

Two brains are better than one, but do too many cooks spoil the broth? A new mathematical model claims to identify the optimal size of a crowdsourcing group, and bigger doesn't necessarily mean better. By **Bronwen Morgan**

Crowdsourcing – the process of getting ideas, work, or funding from a crowd of people – has become central to modern business and, in the guise of online communities, to market research. It would be easy to assume that the bigger the group, the better the outcome. But new research suggests that this may not be the case.

A team of academics, led by Zoran Levnajic of the Faculty of Information Studies in Slovenia, has created a new mathematical model that says – for some tasks – crowdsourcing a problem works best when a certain subset of the population chooses not to participate.

“Human beings probably have an innate tendency to operate in groups,” the paper explains. “The emerging skill of social problem-solving has allowed our ancestors to face the challenges of gradually increasing complexity. This factor not only determined our evolutionary success, but still shapes our cultural and social behaviour.”

But the paper points out that while the existence of large sub-groups of collaborators guarantees a stable support for the community as a whole, it also creates a “socioecological

niche for the free-riders”, who are described as those that benefit from the available social support while “providing little to its development”.

Levnajic and his colleagues tested this hypothesis virtually, by simulating a scenario in which groups of varying sizes within virtual populations were randomly assigned tendencies either to collaborate or to work individually on a problem. The groups were then assigned problems of varying levels of complexity to be solved, and the results compared. A score was also introduced for each player: ‘fitness’, which represents the player’s own benefit in terms of new knowledge acquired from the task.

It was found that for very hard problems, players had no preference on collaborating, regardless of the size of the group. But, for very easy tasks, players in small groups strongly tended to collaborate – in fact, tendency to

collaborate increased with task simplicity, while for players in big groups, this tendency decreased.

The team reasoned that when a task is extremely difficult, it is hard to solve it collectively as well as individually, which leads to there being no preference for either problem-solving approach. But, as the tasks become gradually easier, it becomes less beneficial for players in small groups to work individually, since this reduces the size of the ‘collaborating subgroup’, making it so small that little to no fitness – knowledge benefit – is gained from it for anyone involved. So the choice to collaborate is a safer one in terms of guaranteeing at least some fitness for all players.

But in a larger group carrying out an easy task, there is more incentive to choose not to collaborate, as the collaborating subgroup will always be reasonably large and contribute significant fitness. But, if a player chooses to work individually, they will still be guaranteed some knowledge benefit, making it a relatively safe choice to free-ride in this way.

“An individual facing a new challenge in isolation has considerably smaller chances of solving it, despite relying on the available knowledge,” the paper says. “Yet, if a solution under these circumstances is ultimately found, this subject learns much more than when the solution is found collectively.”

It was found that a group size of 50 had the optimal system whereby both collaboration and individualism were equally beneficial for a task of any difficulty. A group size of 100 saw too many players working in isolation in the hope of getting a free ride, so that the group gained less overall. ■

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The master of nudge

David Halpern leads social purpose organisation The Behavioural Insights Team, the world's first government institution dedicated to applying behavioural sciences. He talks to *Jane Bainbridge* about persuasion, policy and police recruitment

The idea of implementing subtle psychology to encourage people to alter a behaviour is not a new one. In the 1700s, Frederick the Great of Prussia soon realised that using threats to try to push the population into switching from grains to potatoes – to alleviate his cereal shortage – was not working. So he ditched the warnings that he would cut off the noses of people who didn't plant potatoes and, instead, set up an armed guard around his own potato fields. Before long, people were sneaking in to steal the crop and plant their own tubers – and potatoes had become a staple.

Today, persuasion is viewed as a science and, in the UK, David Halpern has been at the forefront of its adoption in policy-making. As CEO of The Behavioural Insights Team (BIT) – set up by Prime Minister David Cameron in 2010 and often referred to as the Nudge Unit – Halpern has been putting the principles of behavioural insight into government.

His recent book, *Inside the Nudge Unit – How small changes can make a big difference*, chronicles the setting up of this unit, case studies ▶

“ For many kinds of reform, it's the unexpected party that can move it forward. If you are in the context of a centre-right government, which is generally trying to make the state smaller and deregulate, it gives a very different tone when you say we're going to use these behavioural techniques **”**



of its work and how its findings have been adopted around the world (as well as sharing stories such as that of Frederick of Prussia).

A Cambridge academic, Halpern moved into the world of policy in 2001, working for Tony Blair's Labour government in the strategy unit. But the more widespread adoption of behavioural science principles really took off under Cameron. So does 'nudge' naturally fit better with a Conservative doctrine?

"Like any tool or knowledge, you can use it in many different forms and for different political purposes," says Halpern. He points to its uptake by governments of varying political persuasions, from Barack Obama in the US to Angela Merkel in Germany, so doesn't believe it suits one ideology more than another.

"It was more difficult for Blair to do it," he says, pointing to how the former Prime Minister was expanding the size of government – both fiscally and in terms of its reach and activity – through laws, which meant it was already subject to the charge of being a 'nanny state'.

Perfect storm

"For many kinds of reform, it's the unexpected party that can move it forward," Halpern explains. "If you're in the context of a centre-right government, which is generally trying to make the state smaller and deregulate, it gives a very different tone when you say we're going to use these behavioural techniques. In that sense, it did make it politically easier to pursue."

So has austerity created a perfect storm in terms of the need to achieve results with minimum – or vastly restricted – budget? "It focused minds," he says. "You had a government that was generally deregulatory in its instincts and departments were subject to cuts. You would think, when government is flush with money, that that's the time of great innovations – but in government and in business, often it's when you're more fiscally constrained that you have to stop and think. When you get more money, you generally do more of the same thing."

Rather than conservative ideals or global recession, however, Halpern thinks one of the crucial factors in the BIT being established was that people within government were ready to champion it – Steve Hilton, the then director of strategy for Cameron, and cabinet secretary, Gus O'Donnell, in particular.

Halpern now appears entirely comfortable with the world of politics, and effortlessly

maintains a balance between watching what he says, name-dropping just enough for suitable import, and giving entertaining, storytelling detail about how BIT unfolded.

Inside the Nudge Unit is bursting with examples of BIT's work across government departments, and some of the case studies have become the stuff of behavioural economics (BE) legend. Indeed, it's nigh on impossible to sit in a BE conference session these days without hearing about how changing one line of an HMRC letter to people owing tax – to 'nine out of 10 taxpayers pay on time' – increased repayment rates by about 4.5%, and brought forward tens of millions of pounds.

So while the tax-repayment nudge is the BIT's most talked about, what work is Halpern most proud of?

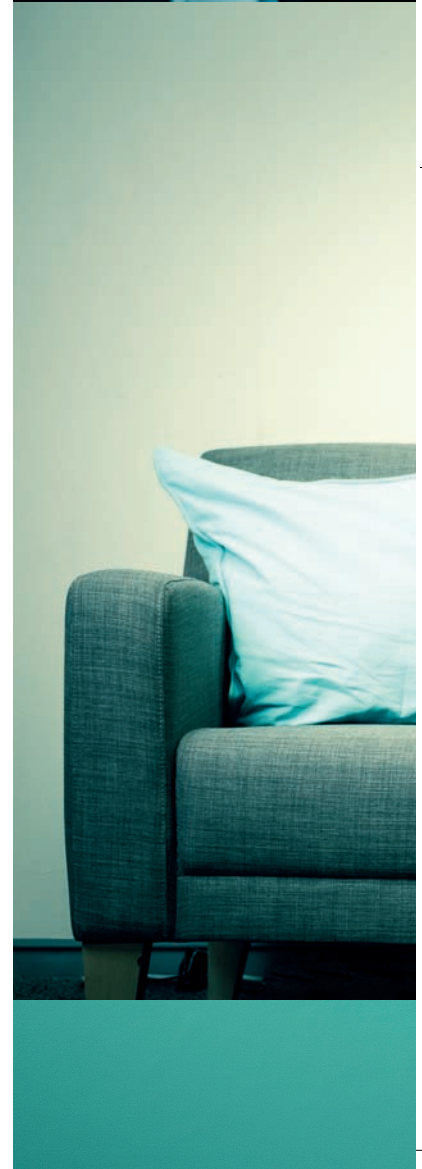
"Getting people back to work faster was interesting, and we were very uncertain whether it would do anything. Not only did we show it was effective, it's now national government policy. We've replicated versions of it in Australia and Singapore with even bigger effects. It's very hard to argue against; why wouldn't you want the Job Centre adviser to be more effective and to help people get into work faster?" he explains.

This example involved relatively wide-ranging changes, including an 'implementation intention' approach; rather than advisers asking jobseekers what they had done in the previous week to find a job, they asked them what they would do next week, and required them to write down their plans in a diary-like booklet. In the initial test, 60% of jobseekers who went through the new procedure were off benefits at 13 weeks, compared with 51% of the control group.

The other example Halpern cites relates to police recruitment. It stemmed from the fact that when potential new police recruits sat the online exam, the pass rate was about a third lower for ethnic minority candidates than white ones. The discrepancy was much discussed, but the BIT employees thought motivation and expectancies might be an issue.

As a result, they tested adding an extra line – just before the applicants clicked through to the test – asking them to reflect for a moment on why they wanted to join the police, and why it mattered to their community. The prompt made no difference to the white applicants, but the ethnic minority pass rate rose considerably.

"I think it is genuinely stunning, that changing one line can move the pass rate for ethnic minority candidates from 40% to 60% – basically closing the gap," says Halpern.





PROFILE



CV
DAVID HALPERN

2010 – present
 Director, The Behavioural Insight Team

2008 – 2010
 Director, Institute for Government

2001 – 2007
 Chief analyst, Prime Minister's strategy unit

1996 – 2001
 Lecturer, University of Cambridge, Faculty of Social and Political Sciences

1993 – 1996
 Prize research fellow, Nuffield College, University of Oxford

1991 – 1994
 Research fellow, Policy Studies Institute, London



that area," he says. "Similarly, a lot of our work is on fundamental policy design, trying to understand and market how a service operates through a sophisticated behavioural psychological lens – which could lead to very different policy conclusions."

As the wealth of knowledge and understanding builds within the unit, its expertise has been increasingly used across disciplines. "We often import an idea and effect from one area and think it would work in another. Nowadays, because we help other governments and public bodies, it also happens cross-nationally."

One of the reasons the work can be shared so readily across countries is that key phenomena operate generally – something, Halpern says, they didn't know five years ago.

"For instance, on social norms – everywhere in the world people are influenced by what other human beings are doing. The basic dynamic is pretty close to being universal."

He cites work for the World Bank in Guatemala – a country "which has low tax morale". Halpern explains that they weren't sure if the UK tax work would replicate; there were so many differences, from the difficulty of sending a letter when people don't have house numbers or letter boxes, to the change of language, and the fact they couldn't say nine out of 10 people pay their tax on time – because in Guatemala they don't.

"Nonetheless, we see very similar patterns of results. The second-best intervention – which increased the payment rates four-fold – was essentially a social-norm message saying 61% of people do pay this tax – because that was still surprising in Guatemala."

While it's easy to herald the successes of this type of work, it's important to recognise that – as in all areas of science – experiments do not always go to plan. In 2006, the psychology professor and author, Robert Cialdini, gave a seminar to Downing Street and talked about how policy-makers sometimes inadvertently use social norms to influence in ways that backfire. For example, a knife-crime campaign could end up communicating the message that most young people carry knives.

"Cialdini called it the big mistake, because you want to make a big fuss and inadvertently signal it's widespread – so you make it more likely – behaviourally, it can be counterproductive," says Halpern. "Or, on gender issues, people say 'it's terrible there aren't more women on boards' – but you're also saying 'OK, it's normal then; we're no different from anyone else'."

► There is certainly plenty to be proud of there; however, one criticism levelled at BE is that – despite its name – it isn't actually science or economics, but rather communications.

"There is a comms element to all we do, if you're trying to persuade someone of something it will involve communication," Halpern says. However, he adds that BE's image is often skewed, as the examples that are most talked about tend to be comms ones, because they are easier to explain – like the tax letter.

"It's much more complicated to explain how we're going to rework what happens in a job centre and what the adviser is going to say – and that you have to change the behaviour of the adviser to influence the behaviour of the job seeker. That is clearly not marketing and comms in a narrow sense, and a lot of our activity is in

Halpern believes it's vital that, in the process of making government more empirical, to share all the results of the experiments – both successful and less successful.

"We did something recently – inspired by some work at Portsmouth – where you show people a picture of their house with all the energy leakage. In the lab, it worked pretty well; when we ran it as a true trial, it didn't work.

"Imagery is complicated; it can create dilution effects, so you don't look at the other stuff – and it can have layers of meaning that you might not be aware of."

Behaviour-based segments

The aspiration to share information and be more transparent is admirable, but it means everyone can access it, regardless of their motivations.

"Most knowledge you can use either for good or bad," Halpern says. "One of the reasons governments are drawn into this is because people are being nudged all the time by businesses to drink or eat this, that and the other – so it's really important that our regulators understand this."

BE principles have been adopted to varying degrees by marketers, with the market research end of the spectrum particularly receptive. But behavioural science can be challenging to some of the established thinking. For instance, in his book, Halpern compares the value of some forms of segmentation (sociodemographic) to being as much use as a horoscope, and argues instead for behaviour-based segments.

"It's not ideological – it's empirical. Certain kinds of traditional segmentation feel very plausible [hence the link with horoscopes] – and you can go to a meeting and say there's this type and this type – but you don't test. So is it really true that those segments respond differently to a different message or intervention?

"We are generally sceptical about *a priori* segmentation; on the other hand, segmentation per se can be enormously powerful," he says.

"In the example of tax, the social-norm message works incredibly well for 95% of the population. It doesn't work on the 5% of the population with the biggest tax debts; in fact, it backfires – and the top 1% are less likely to pay when they receive the message that most people pay their tax on time.

"Can we work out what message will work on those guys? It turns out it's: 'if you don't pay your taxes, we can't pay for schools and hospitals'.

Behaviourally driven segmentation is

consequential in relation to your lever.

"Because of many statutory bars and other practical issues, government can rarely do that kind of segmentation. Even on the organ donation trials, we have no information about who responds to what message – there's no way we can connect that data. It's partly what's written into statute in our data laws."

One thing that is increasingly being debated in BE circles is whether it can be applied to much bigger problems, such as social exclusion, obesity, mass immigration, radicalisation... the list could go on. While Halpern wouldn't claim to have all the answers to the world's woes, he is interested in how it can help us to understand why individuals don't make simple behaviour changes that could significantly improve their outcomes – whether it is saving money, moving to an area with better employment chances, or concentrating in class.

"A rational economic model is struggling to understand what's going on – there's something happening with people's emotions. A lot of our models haven't been anywhere near sophisticated enough to understand those processes. I think a more nuanced account of human behavioural psychology can enable us to work out what the key causal pathways are, and help us develop more focused interventions."

Halpern has long since left academia behind, but his ideal would be to straddle the fields of higher education and government. "At its best, the policy world embodies really good scholarship too," he says. "Understanding how the world is, and drawing on evidence – I've always been interested in the 'so what?' question – why does that matter? Why is that consequential for society or the world? I think the most theoretically interesting spaces are often those where you test your theory in the real world, which is a tough environment – and you learn a lot from it." ■

“ People are being nudged all the time by businesses to drink or eat this, that and the other – so it's really important that our regulators understand this ”

100

2016 marks the 70th anniversary of the Market Research Society (MRS). It's an opportunity to celebrate the social, commercial, creative and intellectual riches of the largest per capita research sector in the world.

For this special report, we asked some of the most influential names in the research business to write about their chosen 'game-changer' – a person, technique or innovation that fundamentally changed the sector forever.



70 years of helping people talk to power

1940s

The birth of sentiment analysis

by Adam Phillips

After World War II ended, it was widely assumed that Winston Churchill would be elected Prime Minister. He had led the nation through the war and Britain had won. All the media expected him to win the General Election in 1945, and the polls confirmed this. So the landslide victory of the Labour Party was a shock. This was the first major failure of 'scientific' polling to predict an election result. The only research organisation to forecast that the Labour Party would win was Mass Observation.

At the beginning of 1945, Gallup put the Labour share of the vote 20% behind that of the Conservatives. The polls continued to show a significant Conservative lead throughout the campaign. The actual result of the election in July was a Labour win with a 7% lead over the Conservatives. On the day of the election, Gallup published a poll that was very close to the actual result, but it was too late to have any influence. Mass Observation had predicted that Labour would win well in advance. At the time, this forecast was discounted because it was not based on a 'scientific sample'. Mass Observation had synthesised information from a mixture of self-selected samples and qualitative work that ▶



included listening to conversations in public places. It had developed a way of classifying the formation of public opinion, which involved six stages:

- 1** What a person says to a stranger (e.g. an interviewer with a questionnaire)
- 2** What a person says to an acquaintance
- 3** What a person says to a friend
- 4** What a person says to a partner or lover
- 5** What a person writes in a personal diary
- 6** What a person says to themselves or dreams

Mass observation argued that traditional quantitative polling elicited opinions at level 1. In the case of the 1945 election, no-one wanted to criticise Churchill publicly; however, conversations with friends were much more open, as people tried to find out if others were also thinking that Britain

needed a change of leader. Mass Observation believed that opinions not yet fully formed were inaccessible to traditional surveys until the person was close to voting. Diaries and overheard conversations among friends were likely to give a much better indication of the issues and the way undecided voters, or those influenced by social norms, were likely to vote.

Social media analysis and mobile ethnography are now accepted research techniques. In 1986, Mollie Tarrant, the research director at Mass Observation in its early years, expressed frustration at the narrow and superficial focus of quantitative research at that time. She wished she had been able to use video diaries; she would have been delighted to have had access to the automated text and image-coding software that is available now. What the Mass Observers were hoping to create 70 years ago is now possible at an affordable cost. They were the first to develop the ideas that underlie sentiment analysis.

Adam Phillips is a Fellow of MRS and managing director of Real Research

The qual revolution

by John Downham

Immediately after World War II, market research in Britain consisted of fairly straightforward usage and attitude surveys. By the 1950s, however, the emphasis had moved increasingly into developing research's ability to explain, and not simply to describe. Attempts to uncover why consumers bought particular products and brands were given extra impetus by the growing concept of brand image.

On the technical side, the development of attitude-scaling methods and other work in the US, by sociological researchers such as Paul Lazarsfeld, led to the use of more complex (and longer) questionnaires – and of more advanced statistical techniques, such as factor analysis. But, on the whole, this was a process of evolutionary development rather than revolutionary change.

In the middle of the 1950s, however, came two potentially game-changing developments. One was the advent of computers into research agency work. Over time, this dramatically altered research activities, initially in the fields of media

and panel research. Even so, the main impact of this and other technological developments was not fully felt until later, with the creation of the internet, the introduction of mobile phones and the growth of 'big data'.

The second major development of the 1950s – the arrival of 'motivation research' – had more immediate effects. Up until this point, the application of psychological theory to market research in the UK had been limited and relatively uncommon. However, growing publicity for the work of US psychologists and psychoanalysts such as Ernest Dichter helped to increase interest – and heighten controversy – among UK researchers, advertising agencies and their clients. In the case of BMRB, for example, a reconnaissance visit by Dichter in 1955–56 led us to set up a new qualitative research unit and alter our company organisation.

From the mid-1950s onwards, the impact of motivation research on the profession and marketing in the UK generally was striking. It

Claus Moser and the LSE legacy

by Geoffrey Roughton

Claus Moser, whose obituary appeared in early September 2015, received many tributes about the way he “did so much to enrich Britain economically and culturally after the Second World War”. He was a polymath; a man of empathy and scholarship; a gifted pianist; a director of the Royal Opera House; and a Master of an Oxford college, picking up a knighthood and peerage along the way.

In such a glittering life, Moser’s contribution to our activities perhaps had less mention. But for market researchers, his 20-year tenure at the London School of Economics (LSE) – where he became professor of social statistics – was seminal to the development of survey methodology. His subsequent appointment by Harold Wilson as registrar general, meanwhile, helped to establish the value and independence of statistics.

For several years after 1945, LSE was pivotal in developing survey techniques. Claus was part of a hot-house of new ideas about social

administration that brought him into contact with luminaries such as Mark Abrams, Maurice Kendall, Alan Stuart, Richard Titmuss, Peter Willmot and Michael Young. That decisions in this area should be evidence-based was an important tenet for Claus. His book, *Survey Methods in Social Investigation* (1958) – written with the involvement of Tom Cauter and John Downham – was groundbreaking work and a very helpful reference at a time when many of us were learning these ‘new’ methods. His book with W Scott, *British Towns: a Statistical Study of Their Social and Economic Differences* (1961), led to Acorn, CACI and other classification systems. Many of the methods we take for granted originated at the LSE; although the projects were social in nature, they spilled over into the commercial sector.

As registrar general, Moser presided over some major changes: the General Household Survey and the Labour Force Survey are ongoing testaments to him. But perhaps the

most important was to insist on the independence of the Government Statistical Service. He put his job on the line rather than agree to delaying the publication of a statistic that might have been inconvenient to the government of the day. That kind of intellectual independence has contributed to the ethos that underlies the principles on which contemporary market researchers hope to collect and present results.

Moser’s comment, “Education costs money, but then so does ignorance”, fits with his belief that good-quality statistics can educate policy-makers, and they should not be amenable to the whims of political masters. The MRS in Britain is the largest group of practitioners in the world. That position has come about, in part, through the legacy of Moser and others at the LSE. He set some good examples; we would be wise to aspire to them.

Geoffrey Roughton is a Fellow of MRS and CEO of X-MR

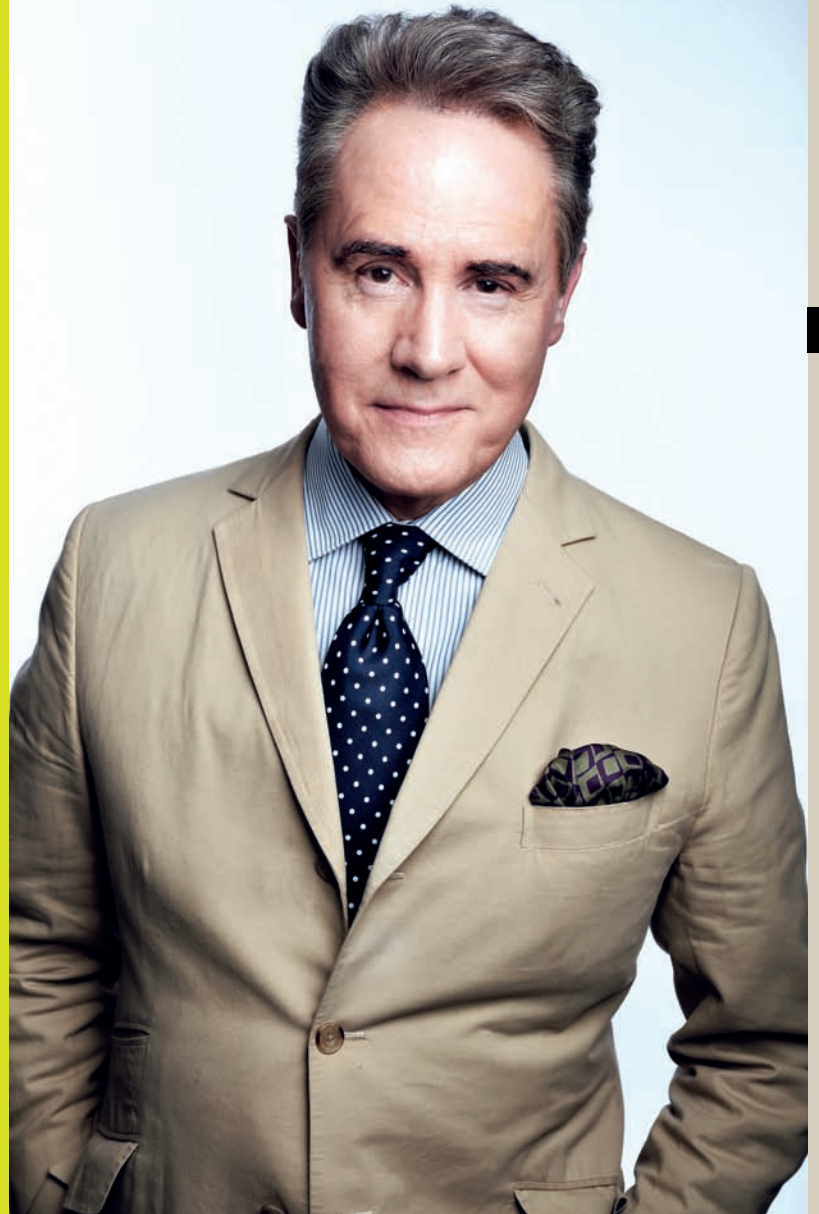
triggered sometimes heated debates on a wide range of issues, including: how important is it for a survey sample to be representative of the survey population; and how is ‘representative’ best defined? How much weight can be attached to the findings from small samples? How reproducible are the findings? What are the effects of interviewer/respondent interactions, and the setting and context of an interview? What training is needed by people carrying out motivational research? What are the relative merits and limitations of ‘depth interviews’ and group discussions? How can possible biases held by the survey designer, interviewer or analyst best be allowed for? Is there too much reliance on ‘gurus’? Could such research be more

appropriately carried out closer to the creative department within an advertising agency?

Arguments about these and related questions risked creating a virtual polarisation of the market research profession – ‘qual’ v ‘quant’. It took some years for any general agreement to be reached about the appropriate relationship between the various research approaches. This upheaval, which started in the 1950s, can reasonably be described as a revolution – but it was one that led to a better understanding of the nature of differing methods and techniques, and to a more broadly based profession.

John Downham is a Fellow and former chairman of MRS

19 60 70s



The market research intelligentsia

by Peter York

My first and only employer, Conrad Jameson, was utterly heroic. Heroic for employing the deeply unpromising me for a start; after I left his business, I had to set up a partnership with clever, disciplined Dennis Stevenson, because it was obvious no-one would ever employ me again! Heroic in teaching me about research and its potential role in the world, linking it to politics, social psychology, architecture and design. And heroic for being a market research intellectual.

The market research intelligentsia was developed by people with a 'big picture' view,

rather than a narrow, technique-based one; who were interested in the world outside the fortunes of the FMCG giants that dominated the client base when they had started working. They would be the people who'd use, say, qualitative work for Heinz to develop big ideas about changing family structures, class variations in table manners and mass delusions about nutrition.

They were the first in the Sixties and Seventies to move out of the FMCG box and into political research, social policy research and working for charities. They were the first movers in relating

What I owe the geeks at IBM

by Eric Salama

In the winter of 1982, I was busy writing my university dissertation. I used a word processor for the first time – some kind of precursor to the lovely Amstrad PCW 8256 that I bought a couple of years later – and I couldn't believe I could cut and paste, and correct errors without the use of Tippex!

At that stage, I had no idea there was a world of market research and insights – and certainly, therefore, no sense that this industry would eventually be transformed by the kind of computer that had brought me so much joy. That is exactly what has happened, however.

Quite apart from the Sex Pistols and The Clash, the late 1970s and early 1980s ushered in two things – desktop computing and relationship databases. In 1977, the Apple II was among three personal computers launched on an unsuspecting public, followed, four years later, by the IBM PC. This computer was based on an open architecture that allowed third-party developers to flourish, and had 640KB of RAM and an audio cassette for external storage! People could use spreadsheets such as Lotus 1-2-3, and database software such as dBASE. Both became top-selling software products for years to come.

A decade earlier, Edgar Codd, (be honest, have you heard of him?) was working at an IBM lab in San Jose, California, and was dissatisfied with the search capabilities in existing systems. This drove him to develop relationship databases and write the 1970 paper *A Relational Model of Data for Large Shared Data Banks*.

Everyone I have worked with knows the importance I attach to the centrality of human curiosity and creativity to great insight work – without it, we cannot understand why people think and behave the way they do. However, it would be churlish of me not to recognise the impact computing has had on our industry.

As the cost of computing has tumbled – and its power and storage capacity have increased exponentially – we have been able to undertake large-scale, global, quantitative survey work, and to analyse and interpret the results. As relational databases became the norm, we were able to look at individual-level attitudes and behaviour, and fuse data to understand cause and effect, and become more holistic in our analysis.

More recently, it has become possible to analyse gigantic amounts of census-level media, purchase and social data, and to use it to make our work more predictive and 'real time' – not to mention our ability to visualise data in ways that bring it to life and give it meaning.



For anyone who believes research can only be considered great if it can be used to make better decisions, the past few years have been inspiring. We are able to give clients better, more holistic insights, in real time, delivered in a way that makes them want to act.

I will always believe that human ingenuity, curiosity and creativity will continue to play a critical role in understanding why people behave the way they do.

However, none of us can underestimate the role that the geeks at IBM, Apple and elsewhere played in giving us the tools to transform our ability to capture and interpret data in meaningful ways – and in democratising the process of market research, and opening it up to millions.

Eric Salama is CEO of Kantar Group

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► qualitative and quantitative pictures of the world, leaving behind the nerdily partisan divide between the two approaches. They were clever, educated people, drawn in by the massive growth of marketing-speak businesses in the Sixties and after. Before, they might have gone into the clever bits of the Civil Service; later, into the clever bits of the City. It felt as if they had all been at the LSE (of course they hadn't) or done something psychological – and, of course, they hadn't all done that, either. But the behavioural sciences were a major reference point for them.

Because it was a smaller world then, they all pretty much knew each other. Some worked as pioneer advertising agency planners, before agency planners suffered their 1980s identity and dress-code crisis. Many worked in small and singular independent companies – not corporate or quoted – and they'd moved around.

They usually didn't work in client company research departments for long because they realised – with a few exceptions – that company researchers tended to be siloed off, didn't get much variety, and didn't get to be CEOs. And client companies had offices in the most epically boring bits of the Home Counties, whereas ad agencies and independents were in London.

Jameson is a Harvard-educated American, who had come to London on a sort of quest that didn't involve working for a living. When his father cut off his allowance, he had to find things to do. What else for a Harvard social science and LSE graduate to do than work with pioneering market research intellectuals such as Liz Nelson and social research firms such as Mass Observation?

Jameson was smart in every sense of the word – and I absolutely loved that. His offices, when I worked there in the 1970s, were in Belgravia, next door to Lord Lucan – just before all that. He was – still is – gregarious, talkative and hugely connected. By the time he hired me, his archive included various county council strategy initiatives, the Labour Party and a raft of design-led clients such as Sanderson. He believed research could drive social policies and design development because he was intensely interested in both. He introduced me to Charles Jencks, the architectural critic and great proselytiser for post-modernism, and Gavin Stamp, the 'Young Fogey' hero of The Victorian Society.

Jameson taught me how to interweave qualitative and quantitative evidence for an argument (and how to make these arguments in 'mock mandarin' paragraphs that made Establishment-types sit up and listen). He taught me that the orthodoxy of 'validation' – doing a qualitative 'pilot' then validating it with some reassuring numbers – was completely wrong. You should, of course, do it the other way around.

Above all, he told me that market research, intelligently designed and persuasively reported, was the best basis for strategic thinking – miles better than the management consultants' MBA cookie-cutter analyses. So your client needs to have his hands on the strategic levers. Aim for the top and report to the CEO. When we started SRU, that was exactly what Dennis and I did.

Peter York is a patron of MRS and a broadcaster and author

Geodemographics: the birth of big data

by Peter Mouncey

I have attended most MRS conferences since the late 1970s, but a presentation that still sticks in my mind is the one given by Ken Baker, John Birmingham and Colin McDonald in 1979, introducing the first commercial application of geodemographics*.

The British Market Research Bureau (BMRB) team had been inspired by a lecture given by Richard Webber at the Centre for Environmental Studies in 1977, describing his pioneering development of a classification of residential neighbourhoods (CRN). This was shortly after BMRB had completely redesigned its main sampling frame using data from the 1971 census – what it believed to be the first nationwide computer-automated sampling frame in the UK market research sector.

This was important because it made it relatively straightforward to add the CRN 36 cluster solution to the sampling frame, and the 1978 TGI dataset was also back-coded with the clusters. It had cost BMRB the princely sum of £160 to obtain a classification!

Webber moved to CACI, and Acorn – the first full, commercial geodemographics process – was launched by the end of 1979, adding the codes to the full list of census variables.

Another important development at this time was the Royal Mail's

introduction of a national postcode system for UK addresses, and its financial inducements to encourage database owners to add postcodes to their address records.

I believe this also led to the birth of 'big data', because – by using the postcode – geodemographic codes could also be added to each record. This eventually provided links to other data, especially from surveys such as NOP's Financial Research Survey. Such systems would become standard in market research in the years ahead and a whole new sector of marketing analytics was born.

Returning to 1979, the findings presented in BMRB's paper opened our eyes to a new world for marketers. As Baker described in his introduction to a reprint of the paper in two special issues of *JMRS* that celebrated the Market Research Society's 50th birthday, they enabled the 'where should I?' question to be answered.

The indices presented by the authors provided a new view of consumer consumption patterns by residential area – whether it was for wine purchasing, credit card ownership, book buying or exposure to media. They also demonstrated its value to social research.

Since then, geodemographic coding – and the different systems – have become ubiquitous within market research and marketing.

CACI and Experian (Webber developed its Mosaic system) remain two major players in this field, but there are several other companies providing such products – updated after the 2011 census – plus an open data ONS/UCL system. The concept has become international – I spoke at the CCN (now Experian) launch conference of Australia Mosaic, in Sydney, in 1992.

There is also the very influential MRS-affiliated Census and Geodemographics Group, founded by Barry Leventhal – who devised the Pinpoint system and FRUITS classification – which celebrated its 25th anniversary in 2014.

Some years ago, Webber was awarded an Honorary Fellowship of the MRS for his work in this field.

**The utility to market research of the classification of residential neighbourhoods, by Ken Baker, John Birmingham and Colin McDonald (BMRB), JMRS Vol 39 No 1, January 1997 – Proceedings of the MRS Conference, March 1979, Brighton.*

Peter Mouncey is a Fellow of MRS and editor-in-chief of the *International Journal of Market Research*

80-90-

Big data has changed our role

by Corinne Moy



Since the turn of the century, there has been an explosion in the availability of data, both inside and outside client organisations. The growth in capacity and flexibility of computing has allowed businesses to harness this information in ways that weren't possible in the past. So now a wide range of data is available to our clients, from which they can extract insight and business intelligence – from CRM and transactional data through to point-of-sale data and radio frequency identification (RFID).

Meanwhile, the digitisation of society has created hitherto undreamed of activities and concomitant behavioural traces – social media data, such as blogs, videos, photos; mobile and location data; digital behavioural data; and e-commerce data.

These developments have led to a fundamental change in the research industry. When I joined it in the early 1990s, we were all about designing, executing and reporting on surveys. But the explosion in data and digitisation has meant clients' expectations have changed. Rather than designing projects to answer specific research objectives, they

require us to meet broader business aims using whatever information is available and appropriate.

Market research, of course, has long been an industry of data aggregators – combining surveys, but at the same time taking our clients' CRM and transactional data and making sense of this.

However, in the new paradigm that big data creates, our role has changed. We now need to define, for each customer assignment, what we measure and how. What is the best way to gather each piece of information? Should we create a survey, use passive measurement, scrape the digital sphere, or create observational frameworks?

Traditional surveys are just one of

the ways for consumers to make their voices heard – and given the wealth of data available via other sources, it is incumbent upon us to make surveys shorter and smarter.

Furthermore, market research is built around implicit and explicit consumer frameworks. By contrast, big data is unashamedly atheoretical. We, as researchers, have adopted a wider role – that of 'curators': identifying, sourcing, integrating, analysing and interpreting the full range of available data to deliver insights that we would not have achieved by more traditional means. This covers the integration of sources via imputation/fusion/matching, as well as via design.

Arguably, we have become the keepers of the total customer view – not just for that bit of their day when they are visible to a brand. We can see the bigger picture by using all available sources to understand the holistic consumer journey and the motivations that drive it. We understand the provenance of data and provide context to it.

This offers us a huge opportunity to explore consumer insights in new ways. It enables us to combine our traditional currency of survey data with all forms of big data – to deliver truly 'smart data'.

Corinne Moy is a Fellow of MRS and global director of marketing sciences, GfK NOP

2000s

Smartphones as a measurement tool

by Paul Bainsfair

The internet, particularly the mobile internet, has revolutionised the way people interact with media. Consumers now have access to a fantastic array of choices and have the means to control what media they consume, where and when.

This creates many measurement challenges; however, one of the major reasons for this growing complexity – the smartphone – also offers the means to not only reach increasingly

uncooperative respondents, but also to precisely monitor their actions.

A person's relationship with their mobile phone is incredibly personal. Many people – particularly in the younger age groups – are totally dependent on their smartphones; they carry them throughout the day and place them on the bedside table at night. The alarm wakes them in the morning and, from that moment on, they ▶



► provide the user with news, communications, information, entertainment, shopping, directions and so on. People, on average, use their phone every other minute.

Given that smartphones are with consumers throughout the whole day, they can be used in a variety of ways to interview respondents – from administering a standard questionnaire to asking interactive questions that are served after specific actions by the respondent, such as browsing a certain product or service, or entering a location. Not only can the respondent answer questions, they can also supply photos and/or videos of their situations, and take part in discussions – all of which are then transmitted back in real time.

Smartphones can also be used as monitoring devices; the total use in terms of calls, browsing, apps and location can be passively monitored via an easily downloaded app. Phones can also be fitted with technology to monitor which television and radio programmes are being received, and, of course, respondents' locations can be tracked by GPS.

The use of smartphones as a measurement tool is a game changer and is growing rapidly as technological advances allow us to do more and more – for the most part, all relatively cost-effectively. However, we have to ensure we treat our smartphone respondents with respect, making sure we do not breach data privacy guidelines and ensuring that the respondent has given full permission to use their data.

We also need to make sure that we do not overload them with questions and that those questions do not become too intrusive. Last, but certainly not least, we need to make sure that we do not drain their batteries!

Paul Bainsfair is director general of the Institute of Practitioners in Advertising (IPA)



The launch of Twitter

by Edwina Dunn

Accurately gathering information about consumers' needs and preferences no longer has to mean asking a question; it might include 'looking over a shoulder' online.

In less than a decade, 320m people worldwide have signed up to Twitter. Suddenly, the likes, dislikes, passions and opinions of a vast and diverse range of the global population are available publicly. Twitter is one of the world's fastest-growing open-data sources and is a goldmine of information about consumers.

The connections people choose to make with influencers – such as brands, media and celebrities – unveil important information about them. And, since time on social media is given freely, these connections are a powerful window into how people live, or aspire to live. You are what you follow – what you're passionate about.

Customer data is a rich source of insight. What are they spending time watching or thinking about? What mix of interests do people display? What's in their digital shopping basket, across all their passions? Which communities do they belong to and how does this affect their transaction behaviour?

Traditional market research methods still have a major role to play in exploring these knowledge gaps, but what if you don't know which question to ask next, or which trend you should be watching out for? Analysis of Twitter behaviour – the whole audience, not just the vocal few – means consumers can now guide research, rather than the other way around.

From my years at dunnhumby, I know that the power of grocery data lies in the high frequency of visits, the sheer volume of interactions with products. Such intense interaction gives incredibly rich



Digital, data and globalisation

by Sir Martin Sorrell

insight into how 16m people live their lives – you are what you eat!

What's amazing is that Twitter data follows the same principles, but on a much larger scale; 260m people using the social network interact with five or more 'influencers'; this means – even if your customers aren't visiting or transacting often – they are still revealing important information about themselves elsewhere, all of the time. This is vital and transformational insight for the vast majority of retailers who record only one transaction a year.

In a world where consumers want brands to be timely, authentic and relevant, the insight from Twitter about your consumers and those of your competitors, all around the world – right now – cannot be underestimated.

Edwina Dunn is a patron of MRS and CEO of Starcount

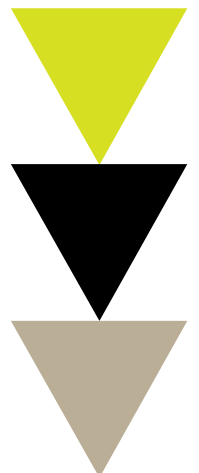
At WPP, what we once called market research or consumer insight is now described as data investment management. Contrary to what the resulting acronym might suggest, we think this is not so dim.

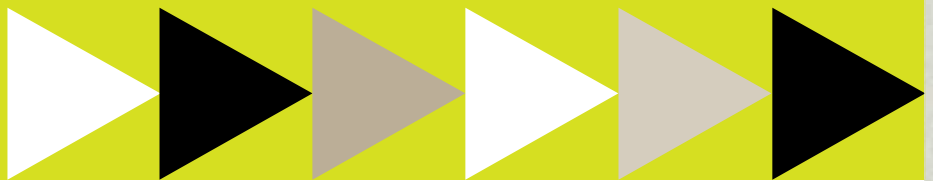
This sector of our business has always been about gathering and interpreting information, but the internet has created a new, ever-expanding universe of data, the sheer volume and complexity of which demands ever-more sophisticated approaches, tools and techniques. It also demands a fundamental shift in how we think

about the business itself – hence the new definition.

Managing clients' investment in data – in a fragmented, complicated world – is what we do, just as we manage their investment in media (today we talk about media investment management rather than media planning and buying). These two areas are increasingly linked within our group, as we integrate data and media to provide clients with the most telling insights and the best return on their investment.

Some dislike the new terminology – and not only for the admittedly





► unfortunate abbreviation – because they believe it relegates the role of insight. Not so. Data collection and analysis is nothing unless it produces insights – and, as Jeremy Bullmore has so elegantly argued, insights have little value unless they are potently expressed.

Unearthing and communicating valuable insights remains the core purpose, and the traditional disciplines of market research remain very important in doing that. However, as digital technologies change the world, we need to be at the forefront of new developments. As TNS puts it: “Advances in social media analytics, data flows from connected, ‘Internet of Things’ devices and many other technological innovations mean that the toolkit the researcher can use to find insights has expanded way beyond the survey.”

One manifestation of this new reality is Kantar’s pioneering

partnership with Twitter to provide real-time social TV data, since expanded to new research products in the areas of advertising effectiveness, consumer insight, brand equity, customer satisfaction and media measurement. Others include the sophisticated social media analysis engine behind TNS’s social products, and our partnerships and investments with Rentrak and comScore, which are coming together.

So the web – and the data explosion it set off – have changed the game. But another force at work has arguably had just as much of an impact: the rise of fast-growth markets – the so-called BRICS, Next 11 and other nations whose economies have expanded so rapidly in recent decades.

Huge growth in the consuming classes has supported the development of advertising and marketing services and, within that,

data investment management. The quantity of data and quality of insights now available to brands in these markets would have been unthinkable not long ago.

Millward Brown, for example, now produces in-depth BrandZ reports on the major brands globally and in China, Latin America, India and, most recently, Indonesia. Shortly after sanctions were lifted, TNS opened an office in Myanmar and conducted the country’s largest ever consumer survey. Soon, we may be able to do the same in Cuba – and even Iran.

The digital/data/fast-growth market combination means, for the first time, we can offer clients a truly global view of consumer attitudes and behaviour – perhaps the greatest ever opportunity for what we used to call market research.

Sir Martin Sorrell is a patron of MRS and founder and CEO of WPP

The future

by Honor Mallon

“There is a world market for maybe five computers,” confided IBM chairman Thomas Watson in 1943, while – almost four decades later – a young Bill Gates predicted that “640k of memory ought to be enough for anybody”.

Over the past 70 years, an avalanche of disruptive technology has transformed the research industry, so why should the future be any different? Can we predict what we cannot imagine?

Passive data is flooding our personal and business worlds: wearables measure our bodies; telematics control our cars; there are more mobile devices than people in the world, their numbers growing five-times faster than the human population.

Gartner forecasts that more than 26 billion objects (excluding computers, smartphones or tablets) will be connected to the internet by 2020 – a 30-fold increase on 2009’s

Internet of Things. As homes, wearables, vehicles and personal data exchanges become more connected, the devices will become smarter; shifting from reacting to predicting.

As our interactions with each other, our suppliers and customers, and the state increasingly take place via a device, the trillions of recorded daily interchanges become the new market research data. Recipients of insight will become blind to the sources of information, concerned only with their utility and ability to deliver competitive advantage.

If big data is today’s disruptive revolution, our task is to find within it that which adds value to business decisions – a process of winnowing or sculpting rather than sampling; a new mindset of data selection, not just data collection. This means customers, employees and stakeholders will be connecting with

researchers in a new context – and this is where behavioural economics, organisational psychology, ethnography, anthropology, and a host of other scientific frameworks for understanding people, can add value. If we can use these to pull practitioners out of those grooves, let’s embrace it.

All of this will help break down the barrier between insight and action. Market research will no longer be things collected some weeks ago from a subset of people answering only the questions we thought to ask. It will be a constant interaction with the real world and in real time, helping us to better understand what is actually going on, to predict the impact of actions more fully, and to make improved business decisions.

As an industry we are the interface between business and the world. We will have to consider how

we are organised to deal with the scale and speed of information. Data visualisation and storytelling are only a fraction of the future. Old measures of quality and rigour will have to be rewritten.

The relationship between research agency, insight department and business stakeholders will need to evolve. Creativity will come into data selection and not just data use. We will need to save time in the gathering phase so that we can spend more time driving value from the insight and deciding how to act. Businesses that neglect the new market research world will be forever stuck in their old grooves.

Honor Mallon is partner of PwC, research to insight (r2i) and she is leading a collaboration with MRS to evaluate the UK research sector, in a report due in spring 2016 ■



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Making video

viral

If video-ad tech company Unruly wasn't on the radar before, being bought for millions by Rupert Murdoch's empire soon brought it to people's attention. The firm's insight director **Ian Forrester** explains to *Rob Gray* how its data and insight on video shareability will boost News Corp

Considering the prominence of cute animals in online video, it feels entirely fitting that my interview with Ian Forrester should be conducted with his adorable pug, Lola, snoozing contentedly at my feet. Lola is a regular presence at video-ad tech company Unruly, where she is fussed over like canine royalty.

Like many a tech start-up, Unruly is based in trendy east London. Its head office – in a side street off vibrant, multicultural Brick Lane – is exactly what you would expect of a young

company of this kind: artfully exposed, post-industrial brickwork; clean lines; quirky neon wall signs; indoor bike racks; pug-friendly; and screens – plenty of screens.

Even a visitor with no idea what Unruly was about would quickly glean a sense of it. But those unaware of the business have become thinner on the ground recently. In September 2015, the company – which was formed in 2006 and became a constituent of the Tech City Future Fifty – hit the headlines when it was snapped up by Rupert Murdoch's News Corp in a deal worth an initial £58m in cash. A further £56m is potentially payable, subject to meeting certain performance targets.

Unruly's founders – Sarah Wood, Scott Button and Matt Cooke – have all agreed to stay on, and now report to high-profile News UK chief executive Rebekah Brooks who recently returned to the media group after a well-documented interlude. The rationale for the purchase is clear: Brooks articulates it as the need to "accelerate our growth in this digital age".

So what has News Corp got for its money? For a start, Unruly offers a sophisticated video-distribution platform and styles itself as the leading programmatic platform for social video sharing. It is a pioneer in tracking video sharing and delivering verifiable video views via paid media across mobile, desktop and tablet devices. Moreover, it has developed a clever tool for predicting the potential for video ads to go viral.

Nine out of every 10 brands in the *AdAge Top 100* have turned to Unruly at some point and, although the company is coy about naming clients, Adidas, Dove, T-Mobile, Evian and Renault are among its top-tier advertisers. In the months ahead, News Corp's

BELOW: Co-founders of Unruly (from l-r) Matt Cooke, Scott Button and Sarah Wood are to stay on at the company after it was bought by News Corp for £58m





business units worldwide will be offering Unruly products to advertising and agency partners, as it significantly steps up its premium video and mobile inventory, and enhances its content-marketing proposition. The first fruits of this came in late October, with the launch of

“Nine out of every 10 brands in the AdAge Top 100 have turned to Unruly at some point, and Adidas, Dove, T-Mobile, Evian and Renault are among its top-tier advertisers”

a new format for injecting video ads into editorial content.

Forrester, as insight director, has a key part to play in helping Unruly's new owner reap a worthwhile return on its investment. “From my point of view, there is a tonne of opportunity working with the News UK guys,” he says. “We are working out where we can add most value

– first, educating News people on social video, viral video, and how to use video. We are running some masterclasses, basically embedding our knowledge in the parent company. Then, second, we will look at advertisers and how we can deliver more value for them.

“Some things are still up in the air, but, essentially, there will be some interesting cross-media analysis. Take a campaign over TV, print and online – how different demographics behave online versus their print consumption. Potentially, it opens up a lot of doors for us from an insight perspective. We have big, established insight teams we can work with, with their own datasets and expertise. I feel we can bring all those together and do something pretty groundbreaking.”

Forrester joined Unruly in 2012, after an approach from a headhunter. Up to that point, his career had been spent with big corporates in the FMCG and home-entertainment markets. Moving to a start-up at first struck him as a ▶

ABOVE: Unruly worked with T-Mobile on the communication company's Royal Wedding Dance campaign, which was timed to coincide with the marriage of Prince William and Kate Middleton



CV
IAN FORRESTER

2013 – present
Insight director,
Unruly

2012 – 2013
Global insight lead,
Unruly Media

2010 – 2012
Senior business insights
& planning manager,
Europe,
Sony Pictures
Entertainment

2008 – 2010
Business intelligence
manager, retail
expansion, Europe,
Sony Pictures
Entertainment

2006 – 2008
Category manager
Tate & Lyle

2005 – 2006
Customer insight
executive
Nestlé SA

2003 – 2005
Graduate trainee,
L'Oréal

▶ “leftfield choice”, but the opportunity to create an insight function from scratch was too tempting to pass up.

“When I met some of the team, I was massively impressed by the level of knowledge, the data, and the opportunities they had at Unruly. They had dabbled in various bits of insight, working with agencies. But, immediately, I recognised that the opportunity here was just vast because of the data we have and the position we have with clients. The fact that we can work across verticals, across territories – it was a huge opportunity.”

In the three years since Forrester came on board, Unruly has almost doubled in size. It now employs around 200 people across 15 offices and has regional headquarters in London, New York and Singapore. In October 2015, it revealed that it was opening an office in Tokyo. The announcement was made during



ABOVE The Unruly team enjoy some downtime in the office

SHARERANK

ShareRank came into being in February 2013 and has been continually tweaked since. Its aim is to identify which parts of a video influence sharing behaviour and why. Shareability of content is predicted in terms of what Unruly calls the share rate: the percentage of people who view a piece of content who will go on to share it.

Unruly's huge dataset provides information on share rates. Regression analysis

enabled Ian Forrester and his team to work out what it was about the most shareable videos that resulted in them being shared.

Psychological responses and social motivations were established as the two drivers for sharing video. Within psychological responses, four important categories were identified: emotional, primal, cognitive and non-empathetic. There was also a menu of more specific responses in each category – for example, in the emotional category,

there was amazement, warmth, and sadness.

"We show them [panel respondents] the video and ask them questions, one section of which is the psychological responses," says Forrester. "Did you feel amazement? If so, at what level did you feel it, from one to 10? We can break out the responses by scene as well."

It will come as no surprise that there is a strong correlation between the evocation of intense emotional responses and shareability.

Boris Johnson's official trade mission to Japan, with the Mayor of London praising Unruly as "one of the great success stories" of the UK capital's tech community.

Forrester is in the midst of "a Japanese deep dive" – looking at the sharing and viewing patterns of online video in Japan. He will present his findings in support of the new office launch.

Having been active for the best part of a decade, Unruly has tracked around two trillion video streams to date. It's a huge dataset and there's no doubt Forrester is proud and enthusiastic about the possibilities. "We have got this incredibly rich data source – which is really awesome from our point of view. It also gets us into conversations with brands at quite a strategic level. We are seen to be at the forefront of social video. So they think: 'These guys don't just distribute social content, they understand content. They understand what makes great content'."

Forrester is keen on collaborations with academia, which he feels many big businesses neglect to their detriment. Unruly works on research projects with universities around the world and has recently added Keio University, in Japan, to a list of partners that includes academics at Wharton business school, at the University of Pennsylvania; Johns Hopkins

University in Maryland, US, and several leading European institutions. Unruly co-founder Sarah Wood is also an associate lecturer at the University of Cambridge, delivering the online video module of the screen cultures MPhil course.

"Ian is great at delivering the research story to the client," says Dr Karen Nelson-Field, director of the Centre for Digital Video Intelligence at the University of South Australia Business School. "He understands the patterns inherent in the Unruly data and can translate that to insight well."

Nelson-Field, author of *Viral Marketing: The Science of Sharing*, is a world authority on viral video and has worked on projects with Forrester for several years. It was her work that provided the starting point for ShareRank (see box).

"Unruly incorporated my emotions research and my early methodology into ShareRank," Nelson-Field explains. "It has come a long way; the algorithm is tighter as Unruly has tested it at scale, and it has since incorporated other metrics that improve the predictive power even further."

Forrester says that the huge dataset at Unruly's disposal makes it easy for the business to foster relations with academics. "We can say: 'What hypothesis do you want



ABOVE Unruly has opened Future Video Labs in New York and London to help advertisers create videos people want to watch and share, rather than avoid

▶ to test? OK, you want to look at these things, we have X, Y, Z data that could be useful for you. Here's the data, let's work in collaboration – we can help feed into your analysis'."

Subsequently, Unruly holds roundtables once research is complete. Clients are invited in to talk about the results. If key strands of insight stand out, Forrester looks at how they can be incorporated into any of the company's products. If "something cool, new and interesting" comes to light, Forrester and his team make sure recommendations are passed on to clients. "In my experience, that's quite different to how corporates work," he says.

This is consistent with the way the business is developing. Unruly very much remains a video-distribution company, guaranteeing viewability to 1.35bn monthly unique users across mobile, tablet and desktop devices. Its insight into what is trending and why, however, means it is increasingly getting involved in strategic conversations with advertisers and their agencies early in the creative process.

Unruly is currently talking to several global brands – in the throes of repositioning themselves – that are exploring how content can help them do that effectively.

But aren't creatives resistant to – or even appalled by – the notion of applying algorithms to their work? Actually, Forrester retorts, the opposite is often true. By looking at emotional responses, ShareRank chimes with what creative teams try to achieve. "In some cases, the client asks to tone down a video or says we can't go to a certain creative place – but then our methodology proves

that, in order for that video to be successful, they need to turn those emotional responses up to a nine or a 10. That gives them creative licence to go out and actually tell stories, as opposed to watering down their work or focusing on less effective things. Most creative people I have spoken to get it, and like it."

Unruly works with a roster of agencies, including eMarketer, comScore and Decipher Media Research. It buys reach data from comScore, while Decipher runs brand studies. There is also an ongoing working relationship with Neuromarketing Labs, a neuroscience specialist in Germany that has helped Unruly develop an electroencephalogram (EEG) brain scan add-on for ShareRank, designed to pinpoint the precise nature of an emotional response to a video.

Of course, to respond to a video, consumers must see it first. Which brings us to the digital elephant in the room – the rise of adblocking. Forrester concedes it is a "big problem" that needs facing. In September 2015, Unruly launched a hi-tech Future Video Lab – initially in

“ Unruly's insight into what is trending and why, means it is increasingly getting involved in strategic conversations with advertisers and their agencies early in the creative process ”

New York, with another subsequently opening in London – to help advertisers create video that people want to watch and share, rather than avoid.

"We have done tonnes of work around what people expect from content," says Forrester. "Creating great content is really important because, with fewer opportunities to speak to consumers, you have to make sure you have your brand message absolutely nailed and that you are getting that intense emotional response from consumers."

Finally, I ask Forrester if he has a favourite video ad. He tells me it changes, but his current number one is Purina Puppyhood, an endearing and amusing video of a man adopting a puppy, in which the puppy food is cleverly integral to the story. As we watch the video on Forrester's laptop, Lola remains asleep – but I suspect she'd like it too. ■

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Journey around

Using data to improve customer service has been central to Transport for London's efforts to improve its reputation, as its marketing director, Chris Macleod, explains to **Steve Hemsley**

During his commute on the Bakerloo Line from Queen's Park to his office in Victoria Street, Transport for London's (TfL) marketing director, Chris Macleod, experiences, first hand, being one of his 30m daily customers. That's more than 1.3bn workers, residents and tourists every year using the road, rail and river network – a massive number for any organisation to manage efficiently.

TfL's strategy is to become more focused on the customer, with Macleod and the thousands of TfL staff embracing – through the effective use of market research, insight and data – the idea that 'Every Journey Matters'.

Macleod accepts that TfL will never be an organisation people love; instead, he and the customer research and employee insight team, headed by Alison Henderson, want to ensure it is not just a brand that people moan about.

"We are not in the happiness business, we are in the reliability business," says Macleod.

"Transport is an essential purchase so we have to deliver day in and day out. Our job is to help people move around London, so research and insight allows us to understand where the pain points are on the system and where we are falling down on customer communication."

TfL was created in 2000, as part of the Greater London Authority, to implement – rather than shape – transport policy. It is also a taxi regulator and responsible for a 580km network of main roads, as well as all of London's 6,000 traffic lights.

In 2011, after the government's 2010 spending review, TfL had to start an organisation-wide restructuring programme, called Project Horizon. It was faced with the challenge of ensuring its customer service wasn't damaged, despite its government grant being slashed – this still represents 23% of its £11.5bn funding, while fares account for 40% of its income.

The strong relationships TfL has with research companies ORC International, Future Thinking, GfK, 2CV, TNS and, most recently, Chime Insight & Engagement Group is helping the transport company to get closer to consumers.

Chime tracks how the organisation is perceived, using benchmarking to understand



the capital

emotional engagement with the brand.

This contract was previously held by TNS, which now carries out TfL's customer satisfaction survey and marketing evaluation work. TNS's group director Tom Costley says that TfL demands more insight and a better understanding of what research is actually saying. This includes demonstrating what is prompting higher or lower customer satisfaction levels. Its customer research takes place across all modes of transport and while people are completing their journey, to provide real-time insights.

"The introduction of new rolling stock on some underground lines, and the installation of air conditioning on tube trains, have enhanced satisfaction," says Costley. "The more satisfied customers are, the more likely they are to use the services and recommend them to others, so there is a real financial link."

TfL has built a research model called Gain Points, to help it understand its customers' gripes. This four-box map records everything people say about the service, how they act and what they complain about. It reveals the scale of various problems and the number of people affected, so issues can be prioritised. "This is not

based on one single piece of research or data source," says Macleod. "We look at customer satisfaction data and mystery shopping findings, for instance, and produce a map for every mode of transport."

He says some findings might indicate that only a few people are affected by a problem; however, this could be an access issue at a station, something TfL takes extremely seriously.

Where TfL has an advantage over many organisations is the willingness of its customers to share personal information if they feel it will improve their journey and help avoid delays. The data is anonymous, but TfL knows where people get on and off different types of transport, and even where people live and work, based on their travelling patterns.

For instance, if someone regularly catches the number 37 bus from Peckham bus station to Putney Heath, and it is being diverted, TfL can send that person immediate information. It also uses Oyster data for alerts if people have opted to register their card and to provide details such as their email address or phone number.

In 2012, TfL started using social media for real-time updates, including for Oyster card

TfL's research model Gain Points helps it understand its customers' complaints



Travellers in London have seen a new cable car (top) in the capital and improved rolling stock on the tube (bottom left)

customer service. By using 'big data', TfL can also issue automatic refunds for delays. This more effective use of data to improve customer service has been central to TfL's efforts to improve its reputation.

Research agency 2CV has led the reputation modelling since 2005 and group research director Kat Jennings says the organisation has had to build trust among customers.

"When we started to look at advertising communication, we found people automatically had negative perceptions about anything they received from TfL. Things improved once research and insight from the different modes of transport were centralised," she says.

Jennings adds that TfL was perceived as expensive and full of empty excuses when things went wrong, but now it is viewed as a brand that is continuously improving. "It is better at communicating and actually cares when things go wrong."

2CV also undertakes behavioural science analysis to help TfL's staff understand how people feel when travel problems occur. "People's needs and emotions change when they endure travel difficulties," says Jennings. "When our journey is going well, we are all

relatively self-sufficient – but it is when there are complications that we do not feel so positive, and need support from TfL."

Being aware of passengers' emotions at different times of the day is crucial in the always-on, digital, 24-hour city environment TfL is adapting to. Indeed, the introduction of contactless payment in September 2014 was an extension of TfL's always-on strategy because it allowed people to travel without cash or Oyster card credit.

Extensive research was carried out before the launch of contactless, which had to be a simple system, communicated effectively. It has proved popular, with more than 200m journeys in London paid for using contactless across London Underground, trams, the Docklands Light Railway (DLR), buses and National Rail services in its first year.

TfL's influence and impact can be felt in less obvious ways, however. As well as generating revenue from fares, it is also a massive media owner, providing advertisers with prime sites via the bus, tube and roadside advertising networks. It has even used commercial development opportunities to introduce 'click and collect' shopping at some stations.



ON THE BUSES

London Buses have been travelling through the streets of the capital since 1829 and, today, these iconic vehicles carry more than six million passengers every day.

That is more people than travel on buses across the rest of England combined and, for every journey made on the underground, there are nearly two made by bus.

Yet buses provide a challenge for TfL; it doesn't own them and there are a lot of negative comments on social media about the bus service and drivers.

Many TfL customers ignore this mode of transport because they regard the bus network as complex.

If TfL is to succeed in its wider objective of improving the customer experience, buses need to be central to its plans.

The organisation has carried out operational research with ORC

International to identify pain points on the network, and to encourage changes in behaviour. There has also been extensive employee and mystery shopping research to highlight mismatches in how TfL staff view the bus service and the perceptions of the travelling public.

TfL has also worked with ORC International to deliver a series of workshops with bus operators and staff. ORC's account manager Jane Tidswell says the bus driver research led to a cultural change. "How customers viewed the bus service differed greatly from the opinions of the bus drivers, as the correlation of insights showed," she says. "We used the findings to create workshops, and encouraged a culture of every customer being welcomed every day, because every journey matters."

TfL marketing director Chris Macleod says the biggest barrier to people using

the buses is the perception that it is a complicated system.

"People will use buses if they know the route, but they find travelling harder than plotting a route on a tube map," he says.

"People also get annoyed if a bus does not stop. They may think the driver could not be bothered, but the bus might be full.

"We need to get better at communicating around buses."

TfL has taken data from the Oyster card system to demonstrate to investors in the city the importance of buses, by showing how many people who work in the financial district start their commute on a bus.

Bus data is also supplied free to app developers and used in products such as Citymapper, to help passengers behave differently, while reassuring them they are on the right bus.

► It generated £169.5m from advertising revenue last year, and the huge amount of data it holds is incredibly valuable in helping brands improve their targeting.

Macleod is currently reviewing TfL's own advertising needs, with the creative and media accounts out to tender. He wants the agencies selected to be more innovative, and TfL's customer and insight team to have a closer relationship with the media and creative agencies' insight departments. He feels this will create a more agile approach to research and a more holistic view of customer trends.

Olympic legacy

The massive surge in traveller numbers during the 2012 London Olympics taught TfL a lot about how to communicate more effectively with locals and tourists.

During the Games, more than 60m journeys were made on the Tube – up 30% on normal levels – the DLR had more than six million journeys (+100%), and London Overground nearly six million trips (+47%).

TfL focused on travel-demand management and informing people how they could travel differently, rather than trying to discourage them from travelling at all.

According to the report *Olympic Legacy Monitoring: Personal Travel Behaviour During the Games*, travel unrelated to the Games reduced by 5% on an average day during the Olympics and 3% during the Paralympics.

Across the two weeks of the Olympics, more than three-quarters of the London travelling population changed their travel patterns, with just 23% travelling as normal:

- 63% reduced their travel
- 28% changed the time of their journeys
- 21% changed route
- 19% changed mode.

People who altered the time of their commute to avoid the busiest periods were more likely to make their journey earlier rather than later.

While the goal was to change travel habits for the duration of the Games, 15% of regular travellers who made alterations have continued with that adjustment.

“Behavioural change is not a single strategy and the data tells us a lot,” says Macleod. “People think of a rush ‘hour’ but, in fact, there are peaks and troughs on the buses and the tubes. There might only be a 15 minute period that people should consider avoiding.”



CV

CHRISTOPHER MACLEOD

2007 – date
Marketing director – Transport for London

2003 – 2007
Marketing consultant and independent director

2002 – 2003
Managing partner – McCann Erickson Advertising, London

1996 – 2002
Chief executive – Collett Dickenson Pearce

1995 – 1996
Director – Saatchi & Saatchi

1987 – 1995
Deputy managing director – Laing Henry Advertising

The Olympics also revealed how TfL needs to adapt to a growth in passenger numbers. A report by the Mayor's office predicts that London's population – currently more than 8.6m people – could reach 11m by 2050.

“All we can do is overlay population growth predictions with economic data, but it is hard to predict how fast numbers will grow,” says Macleod. “The challenge is to know where to invest and when. Will people be living and working differently in 2050?”

Of course, any organisation's aim to become more focused on the customer will only succeed if its employees are engaged. TfL carries out an annual staff survey, called Viewpoint, and six-monthly studies on specific issues. Alison Henderson has worked within the London transport sector for 25 years. She believes that, at 15 years old, TfL has a clearer idea of what it wants to achieve in future, and research will continue to play a crucial role in its growth.

Henderson says the staff survey has been revamped to get the employees' views on management, the brand and the changes taking place, as well as their individual role. “Local and organisational action planning comes out of the survey. People want to take part in it because they can see the value of it.

“People within this organisation see the value of research and we are at the centre of everything. Everyone within TfL is aligned to the customer-centric model and, working with the wider marketing department, my team is championing customers.”

Indeed, research is fundamental to ensuring TfL delivers on its customer-first strategy. A reliable and thriving London transport system boosts everyone's quality of life, as well as the capital's and the UK's economy – something Macleod often contemplates during his daily commute on the busy Bakerloo Line. ■

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“ Many customers of the big building societies are long-term savers or long-term mortgage holders, who might not go into branches very often, so have little interaction with the brand ”

The feeling's mutual

Many businesses claim to have customers at their heart, but the Yorkshire Building Society has changed the way it uses market research, from introducing online panels to an extensive testing programme, to ensure it understands all of its customers, as **Bronwen Morgan** finds out

The financial services sector has taken a battering since the global recession, with people's trust in it hit badly. One consequence of this has been that the once unpopular building society model has found new advocates – but, in a highly competitive market, those few surviving mutuals still have to compete with the big boys.

So it's not surprising that Adam Lerner, Yorkshire Building Society (YBS) Group's senior research manager, says the business has gone through an intense period of change over the past six years. This includes the regulatory change undergone by the whole financial services industry – namely the comprehensive Mortgage Market Review implemented by the Financial Conduct Authority in April 2014 in an attempt to constrain high-risk lending and borrowing – and significant changes to the group's structure through mergers and acquisitions. (See timeline).

Despite all these changes, says Lerner, one aspect has remained consistent: the group's focus on its customers. "Because we're a mutual, rather than having shareholders, we've always had members and customers at our heart. Everything we do, we test with them. We've modernised our approach recently, but we've always had that philosophy."

A small part of that modernisation has been YBS Group's creation, with Verve, of an online

customer panel in the past year. This is used as a quick customer sense check, to make sure any changes made are done in a way that delivers what the customer wants, Lerner says.

An even more significant alteration in the group's research activity has come from teaming up with KPMG Nunwood on its customer experience and outcomes testing programme. Before 2012, when the partnership was established, YBS Group's research programme consisted of some mystery shopping and customer satisfaction activity.

Together, YBS Group and Nunwood (as it was at the time – it was acquired by professional services firm KPMG in May 2015) set up the customer experience tracker, which measured the behaviour of people who went into branches with some questions around the brand and the product. However, it soon became clear that there was room for improvement on the tracker, according to Rob Edwards, associate director at KPMG Nunwood, who joined the account in 2013. "We [Edwards and Lerner] both realised it was good for certain things, but it was quite difficult to get to some of the more sophisticated questions that Adam's team were being asked and that, subsequently they were asking of us," he says.

Much of the shortfall was because many customers of big building societies are long-term savers or long-term mortgage holders, who ▶



▶ might not go into branches very often, so have little interaction with the brand.

To address this, they gave the survey two layers – a relational survey that goes out to everyone, and a transaction-based one for those who interact with the brand on a regular basis. The tracker also now encompasses brokers’ customers – a group, Lerner believes, the mutual has just as much responsibility towards as its direct customers. As he says, the team – via the tracker – can now see the point of view of almost everyone they need, “whether it’s people that interact with us, don’t interact with us; whether they’ve got a balance with us or not; whether they hold a mortgage, savings, insurance, investment product... they hold an equal voice as far as our business is concerned”.

Six-pillar framework

The customer experience tracker surveys around 2,500 people every month, across a range of measures. “It’s a really comprehensive view,” says Lerner. “It’s trying to gauge how we perform in the eyes of the customer across all our brands, but also whether we are treating all our customers fairly and as they would expect to be treated, given that we are mutual.”

The tracker uses KPMG Nunwood’s six-pillar framework, which has been designed around the belief that outstanding customer relationships have a universal set of qualities: personalisation, integrity, expectations, empathy, time and effort, and resolution. According to Edwards, the approach was conceived to go beyond tools such as net promoter score (NPS) to “diagnose what’s going on underneath”.

At the beginning of their partnership, Edwards explains, YBS Group worked with Nunwood to repurpose the original six pillars to create the acronym RESPECT, which stands for: Resolution, Expectations, Simplicity, Personalisation,

Empathy creates Trust – and Edwards says he has been impressed by how the whole YBS Group has got behind the idea. “They have spread the acronym around the business and it’s gone beyond just a measurement tool to become an operational tool – it’s actually in staff handbooks,” he says.

“If you talk to people at YBS, they all understand the RESPECT pillar system. Now there’s training in place to understand how you can move the dial on those pillars and how you can influence customer experience through the pillar system.”

Lerner believes what makes the system so effective is being able to fit operational goals into the categories aligned to the pillars. “You can see your vision and can tangibly break that down into aspects that any business can focus on. Obviously, for us, it means applying it to the YBS way, with mutuality and the way we operate. It just makes it really tangible for the people of YBS to get behind.”

Lerner manages a six-strong research team that sits alongside two other arms within the group’s customer and channel experience function: the customer analysis team and the customer experience team. The research team’s role is, unsurprisingly, to provide insight, as is the analysis team’s, though theirs comes via behavioural data. The customer experience team is there to take that insight and push it out to the rest of the business to drive change, Lerner explains – and it uses a particular forum, the customer experience committee, to highlight the issues that require focus.

The customer experience committee is a strategic group that meets once a month to look at what patterns are emerging from the tracker, including what’s driving customer dissatisfaction and how these issues can be addressed. It consists of 14 senior figures, including the chief executive, chief customer

YBS GROUP TIMELINE

1864:
Huddersfield Equitable Permanent Benefit Building Society established by a dentist, a shoemaker and a plumber

1866:
West Yorkshire Building Society established at the Royal Hotel Dewsbury

1885:
Bradford Self Help Permanent Building Society created

1975:
The Huddersfield and Bradford building societies merge in the largest marriage of two societies at that time

1982:
The Huddersfield & Bradford and West Yorkshire building societies merge: the Yorkshire Building Society is born



officer, head of complaints and the senior research manager (Lerner).

Sitting underneath this group is the customer improvement committee, which looks at complaints data, research data and other sources of information from around the business, in order to get down to the root cause of any dissatisfaction. This sub-committee is made up of operational leaders from across the group's business functions.

Operational change

These functions fit together to ensure customer insight is shared throughout the business, Lerner explains. "We use the customer experience committee forum to get the strategic issues on everyone's radar; we use the customer improvement committee to drive operational change and really focus on what's going wrong and how we can fix it," he says.

"But then on each individual piece of research that we do – for example, if it's an NPD [new product development] piece that we've tested through our customer panel – there may be actions as a result of the research that will help shape the communications for that new product launch. We've got multiple routes to drive change and action from the insight."

In his time working on the account, Edwards says he has seen the idea of mutuality and customer focus play out at YBS in the way that it

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In 2014, YBS Group had an 18% increase on its core operating profits, to £178.8m, and is now the second-largest building society in the UK, behind Nationwide

► handles research outcomes. “It’s testament to Adam’s team, but also to the wider organisation’s desire to start using insight to drive change,” he says. “And we [Nunwood KPMG] have grown with them through how we measure that insight.”

More generally, Edwards believes there has been “a sea change” in the idea of customer experience leading the way organisationally. “People are getting less concerned about metrics and more concerned about some of the things that Adam’s talking about, such as root causes; what customers are actually saying; how we can effect change on the bottom line that actually means something to the end customer, and not hide behind some NPS or CSat [customer satisfaction] score.”

Edwards stresses that these types of metrics – NPS and CSat – are still important because they are the basis of how performance is tracked. But finding out what’s behind these

numbers, and what is subsequently done with that information, is really important, he says.

“We’ve certainly seen this in our work as an agency, but particularly with YBS – it’s very keen to get to this root-cause analysis. We talk about it a lot. The numbers are saying one thing, but what does that actually mean? How can Adam put that round the business, and how can change be effected?”

Of course, this is a key question with any insight work: what impact does any change that’s being observed actually have on the business? YBS Group has reportedly experienced change to its financials – in 2014, it had an 18% increase on core operating profits, to £178.8m, and it is now the second-largest building society in the UK, behind Nationwide – and to its competitive customer experience statistics. In the September 2015 UK Customer Experience Excellence (CEE) analysis from KPMG Nunwood – which ranks brands on consumers’ perceptions of the customer experience they deliver – YBS Group was placed in 27th place, with a CEE score of 7.67. This was an improvement of 11 places on its 2014 ranking.

Lerner strongly believes YBS Group’s success can be attributed to maintaining its mutuality and, therefore, its customer focus. “I used to work for Bradford & Bingley before 2008: it was originally mutual, then it demutualised in 2000. It was the smallest bank in the UK, with the vision of being the market-leading company for specialist mortgages, and, on reflection, I think that wasn’t a great way to go – and it went under as a result.

“There are clear examples of where it hasn’t worked – examples where they have been so shareholder-focused and looking for risky returns that it’s been the demise of some of those companies. YBS has not gone down that route and is still focused on its customers. That’s helped it weather the storm of the recession very prudently.” ■

1992:
Yorkshire Building Society merges with Haywards Heath Building Society

2008:
Yorkshire Building Society merges with Barnsley Building Society

2010:
Yorkshire Building Society merges with Chelsea Building Society

2011:
Yorkshire Building Society acquires the Egg mortgage and savings book Egg brand

2011:
Yorkshire Building Society merges with Norwich & Peterborough Building Society

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COMING ROUND TO THE CIRCULAR ECONOMY

RESEARCH PRESENTED IN *WASTE TO WEALTH* POINTS TO THE POTENTIAL \$4.5TN THAT COULD BE GAINED BY 2030 IF BUSINESS ADOPTED WASTE STRATEGIES. THE BOOK'S AUTHOR, **PETER LACY**, TALKS TO *JANE BAINBRIDGE* ABOUT THE BENEFITS OF A CIRCULAR ECONOMY

The concept of the circular economy has been around for decades, but Peter Lacy – global managing director, Accenture Strategy, Sustainability Services – believes it is now gathering momentum, thanks to the digital revolution and the disruptive strategies that many companies born in this era have adopted.

He defines the circular economy as the decoupling of economic growth from the extraction and consumption of constrained natural resources – that is, scarce resources with negative footprints, such as fossil fuels and hard-to-recycle metals – where dependency creates a competitive disadvantage over time. ‘Circular’ approaches keep resources in productive use in the economy for as long as possible.

The circular economy goes beyond the more familiar, such as recycling, and embraces the more obscure. Lacy's book, *Waste to Wealth*, identifies four forms of waste: resources (materials and energy that can't be regenerated); life-cycles (products with artificially short working lives); capability (products sitting idle); and embedded values (components and materials not recovered from disposed products). His stated ambition is nothing if not bold – “to empower executives to make the circular economy a transformation comparable to globalisation and the digital revolution”.

“I see the circular economy as an interwoven concept with digital and globalisation rather than an alternative; it's the way you think about globalisation or the way you

use digital technology,” says Lacy. “It's a fundamental re-engineering of our global economic system and a fundamental redesign of the way we think about fuelling prosperity at a macro level. It's how we frame the delivery of value to customers and citizens at the micro level, and decouple that from wasted or scarce natural resources and their impact.”

While he admits it is extremely ambitious, Lacy also believes it is possible. “It is achievable in the sense that we have never heard anyone seriously say that we couldn't do it. We have the technology and science available – you hear people say ‘we won't do it’, but that's a choice; it's a policy design choice; an investment design choice; a business strategy design choice.

“So I'm a big believer that if we can do it – and look at human history and necessity and need – then we will do it. It is possible; we haven't designed our global economy or business strategies in the right way.”

Waste to Wealth is the product of the work Lacy had started when setting up the World Economic Forum task force on the circular economy around four years ago, plus his involvement with the Young Global Leaders community. Research he carried out for this led to the finding that there is a potential \$4.5tn reward (or the value of lost growth) in turning current waste into wealth by 2030. Lacy's model predicts this will grow to reach \$25tn by 2050.

To push this concept beyond a few visionary business leaders and sharing-economy start-ups, however, it needs to be widely adopted – and the current business focus of short-term shareholder needs must play second

fiddle to broader societal and environmental needs. So how can this short-termism be counteracted?

“The book is written with a view to understanding the next 15 years of business and marketing opportunities that firms can go after in the existing paradigm. The \$4.5tn opportunity to 2030 doesn't even factor in a serious price on carbon,” says Lacy.

“We've assumed ‘business as usual’ trends and come up with strategies that can create genuine competitive advantage through revenue growth and new markets, new products, new services, cost reductions, better risk management, brand impact and differentiation.”

He says some governments are starting to experiment with policies – ranging from product passports to waste credits to resource responsibility. While Lacy thinks visionary leaders will always have a role to play, he believes the more potent driving force for the circular economy will be innovative, disruptive businesses that decouple their value from resources, whether or not they call it the circular economy.

“You could make a very good case that Airbnb is one of the biggest contributors to the circular economy in the world – although it's never used the term, and probably never will. But it is fundamentally changing the use of a very big, resource-intensive asset that people have and under-use, and has found unique ways of creating customer value without building new hotels or new houses,” says Lacy.

“The potential of the digital revolution to be a circular revolution is enormous. It's not automatic, but – if we're smart – we can orient the digital advances to be radically resource



productive, resource effective and resource efficient.

“If someone said to me: ‘why are you hopeful now about the circular economy, rather than 10 years ago, given that the concept has been around for 30-40 years?’ I’d say digital technology is the potential game-changer.”

Five models that any business can consider and take inspiration from have been explored in Lacy’s book, along with real examples of businesses implementing them:

The circular supply chain – introducing fully renewable, recyclable or biodegradable materials that can be used in consecutive life-cycles to reduce cost and increase predictability and control.

Recovery and recycling – creating production and consumption systems in which everything that used to be considered waste is revived for other uses.

Product life extension – by maintaining and improving products through repairs, upgrades, remanufacturing or re-marketing, companies can keep them economically useful for as long as possible.

Sharing platform – creating new relationships and business opportunities for consumers, companies and micro-entrepreneurs who rent, share, swap or lend their idle goods.

Product as a service – when consumers lease or pay for products by use, performance trumps volume, durability tops disposability and companies have the chance to build new relationships with consumers.

“Rarely what you see is a pure play; instead people blend those models. But it’s really understandable to executives,” says Lacy. ■



TELL ME A STORY

No-one in business has enough time. Buyers of research are deluged with presentations; with 'big data' promising more information and even more material to ingest. We live in a DRIP world – 'data rich, insight poor'.

The industries that are responsible for generating information, knowledge and insight are still churning out what I call 'data freighters' – super-tankers of often undigested, and indigestible, material. We all instinctively know this is compounding the problem for the precious, but over-taxed, attentional resources of ever-demanding clients. How did we allow this to happen and, more

AVOID WEIGHING DOWN CLIENTS WITH DATA. IT'S TIME TO START STORYTELLING TO MAKE SURE INSIGHT IS ACTED UPON, SAYS **ANTHONY TASGAL**, AUTHOR OF *THE STORYTELLING BOOK*



importantly, how can we turn back the data freighters?

A large part of the problem is 'arithmocracy' – a system based on the worship of numbers as gods, and an unshakeable, if unproven, belief in safety in numbers.

We see it encroaching across much of our lives: school league tables, goals for NHS waiting times, and police crime-rate targets, to mention but a few. In our world, we see it in the ceaseless onslaught of ubiquitous and tyrannical metrics, which reduce as much as enlighten.

We have become enslaved to a form of marketing-as-science known as 'physics envy'; the belief that humans are like atoms – predictable, controllable and susceptible to solely mathematical analysis and arid, rational and scientific presentation. It is as if we are guided by the spirit of Dickens' Mr Gradgrind, from *Hard Times*: "Now, what I want is Facts. Teach these boys and girls nothing but Facts. Facts alone are wanted in life."

The deep-seated fear that 'somewhere there is more data I could have examined before I made that decision' needs to be resisted.

The research industry hasn't got to grips with the fact that it should frame itself as part of the communications and ideas business, rather than the data-transmission industry.

Instead of aspiring to the wrong sciences – mathematics, economics and physics – it needs to accept that it is at the heart of the persuasion and influence industry. It therefore needs to look to biology, psychology and complexity, and abandon its worship of arid rationalism.

FROM INFORMATION TO INSIGHT

As a long-term provider, I believe insight remains the prime currency of our business. Information (or data) is merely fuel for the 'insightment' engine – it depends on the ability to perceive new and unexpected connections. My favoured distinction is this: information is to be collected; insight is to be connected.

As a card-carrying member of the Worshipful Tribe of Behavioural Economists, I want to advise the research industry and their clients that human behaviour does not follow the reductionist principles of information processing.

Instead, behavioural economics (BE) shows us – reminds us, really – that humans are not rational information processors. As various governments have discovered in embracing 'nudge units', telling people doesn't work, because humans do not merely receive transmitted information and act accordingly (anyone have children?).

In my book, I refer to another term I find helpful. By analogy with carnivores and herbivores, I like to think of consumers (a word I would happily banish from the marketing lexicon) as 'semavores', devourers of meaning.

The research world – clients and suppliers – should be in the business of constructing and delivering meaning. When it comes to human communication, meaning beats truth; so researchers need to be less frightened of the nightmare of imprecision and more attuned to unearthing and sharing universal human truths, plus the insight and imagination that create meaning.

EMOTIONAL STORYTELLING

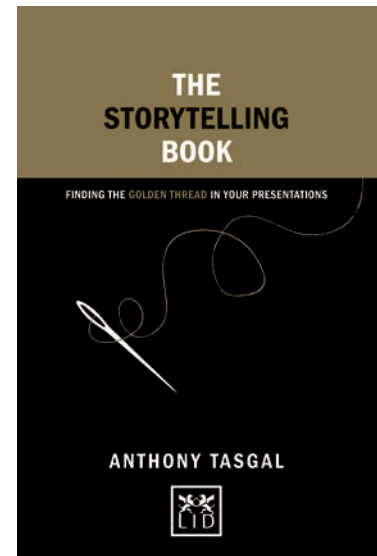
If numbers numb us, stories stir us. They translate information into emotion. Stories are patterns with meaning that the brain is naturally hard-wired to respond to, whether we are aware of it or not. Neurochemically, there is even evidence that stories make us care, create empathy and build trust by generating oxytocin, a hormone associated with human bonding and empathy.

Here are three tips (there are 24 in the book) to help make presentations and communications more effective and memorable:

- If stories are patterns with meaning, and the brain values pattern, make sure your presentations have a sense of deep structure and coherence. Find your golden thread: it may be the journey to and from your central insight; or an argument or angle you are sustaining – but ensure there is something for the brain to hold onto, rather than just 'one chart after another'.
- We are designed to respond to surprise, an important emotion because it alerts us to what is evolutionarily relevant rather than what is just more of the same. Prioritise what will be emotionally surprising, because this is likely to be meaningfully memorable to your audience.
- Massage, don't message. Our business is obsessed with messages and all the rational, didactic baggage they carry. Far better to approach a communication from the point of view of personal meaning, and understand how to massage the self-worth and impression-management of your audience. What will make them feel good about themselves, their role and their outcomes?

Oh, and there is evidence that storytelling not only makes your work more effective, but it makes you ever so slightly happier into the bargain. ■

Anthony Tasgal is author of *The Storytelling Book – finding the golden thread in your presentations*, published by LID Publishing



THE MYTH OF THE SENIOR DECISION-MAKER

SALES AND MARKETING TEAMS LOOKING TO SELL THEIR PRODUCTS AND SERVICES NEED TO IDENTIFY THE 'MOBILISER' IN THE CLIENT ORGANISATION, AS THEY ARE THE PERSON WITH THE CREDIBILITY AMONG THEIR COLLEAGUES. BY **PAT SPENNER**



Having the most efficient and go-getting sales team no longer guarantees high-quality results in today's B2B buying world. Even several years after the global recession, companies are still incredibly risk averse, and finding a buyer in an organisation willing to put their neck on the line to push your deal through can seem almost impossible.

Part of the reason for this is that the senior decision-maker no longer exists; rather, there are now, on average, 5.4 stakeholders who need to be convinced for any buying decision. Going straight to the top is not a viable option, and CEB research shows that only one in three senior executives is likely to be the person orchestrating change in their organisation.

So who do sales and marketing teams need to be targeting? Hint: it isn't the friendly, eager-to-help customer. Instead, they need to engage people who are inherently sceptical and who often intensely question a supplier's offering or services. We call this person the 'mobiliser' in our book, *The Challenger Customer: Selling to the Hidden Influencer Who Can Multiply Your Results*.

These are the customers who have the credibility to help create consensus and secure buy-in among their colleagues. It's these very traits that make mobilisers so effective at inspiring their organisations to act, effectively making them the architects of change.

To identify mobilisers and equip them to forge change, sales and marketing teams need a new approach – one that focuses on three key actions:

1 Target mobilisers, not advocates

Marketers need to revisit the conventional approach to building personas. Instead of focusing on personas that anchor on a customer's role, title or function, they should

build their personas around mobilisers. Similarly, sales reps should be able to identify the customers they believe can truly drive action and help win over their colleagues – if they can't name a mobiliser, it's time to reassess the prospect or move on.

2 Unteach customers

Focus on disrupting the customer's self-driven research by teaching them where there are flaws in their thinking. We call this 'commercial insight'. Where thought leadership focuses on teaching the customer something new, commercial insight is about unteaching the customer something they already assume or believe about their business. It's diplomatically telling customers they are wrong, and showing them a clearer view on the problem, its causes and the right course of action.

3 Understand how customers believe their business works

The only way to tell a customer that they are 'wrong' is to understand what they believe in the first place. A simple exercise marketers can do is to list the drivers that customers believe lead to important business outcomes. Then ask several customers to review that list and tell you what they would add, remove or refine. In essence, this will create a map of the customer's mental model, which can highlight where they have flawed thinking in areas that only your solution can address. That's the starting point for the kind of teaching and insights that leading suppliers bring to their customers.

While the route to a decision-maker is not as straightforward as it once was, it does not mean the challenge of marketing and selling to the right person is insurmountable. Instead, marketers and salespeople should view it as an opportunity to find the right person to help them along the journey – a mobiliser who can forge consensus and drive positive change for all involved. ■

Pat Spenner is strategic initiatives leader at CEB

Reputation is all – a view from the City

How do investors put a value on reputation? Reputation is genuinely priceless because it cannot be bought on the open market. It has to be earned the hard way, the long way, by never putting financial interests above values.

In a corporate environment, this is embodied in the culture of a company, and underpinned by strong governance and strict adherence to compliance, regulation and risk.

It is displayed by always looking after the interests of clients, shareholders and employees. It is never forgetting that without shareholders' capital there is no company; without clients there is no business; and without employees there is no service.

Companies can rebuild their reputation after once losing it – but it is a long climb back, and the management must be seen as a fool who has learned his lesson.

Rolls-Royce, for example, went into administration in the 1970s, but over time recovered its reputation and standing and, today, is still the generic term for 'the best of the best'.

So is reputation important in making investment decisions? While the business model is the ultimate determinant of success, the market views management and its reputation as equally critical to an investment decision. Simplistically, management reputation is the P (price) of the P/E (price/earnings) ratio, and business model the E.

That is why there is a huge price differential between Exxon Mobil and Rosneft – both companies have the same provable oil reserves, and the same daily output, but the former is valued five times as highly,



“Some of the best-performing firms are family-owned”

and widely considered to be a stalwart of good governance. In the final analysis, reputation is the value of a company's goodwill; it is the difference between market capitalisation and net tangible assets.

Companies can have different reputations for different things – but do investors care? Long-term investors know that a successful and sustainable company needs to look after all of its constituents – total shareholder return (TSR) for stakeholders, HR for employees, and products & services for customers. They know that a good reputation for TSR/HR/products & services translates into top-line growth and, even more importantly, bottom-line growth in the form of rising dividends and returns.

Hence, a major oil company known for dirty toilet facilities in its motorway petrol stations ended

up paying more than \$50bn for an oil spill in the Gulf of Mexico. It had scant regard or respect for its consumers and, ultimately, this cultural indifference translated into slack safety and risk-management procedures.

Similarly, a leading supermarket chain not unknown for sham special offers based on feigned earlier higher prices ended up with a horsemeat scandal.

There are many more corporate examples – from airlines to motor manufacturers – where a culture of institutional failure in one area has ultimately translated into failure across the board.

Much of this is due to short-termism, which goes a long way to explaining why some of the world's finest – and best-performing – companies are family-owned.

Their decisions are made on a long-term, generational view, and cash flow is deployed in research & development and capital expenditure to create organic growth and capture market share.

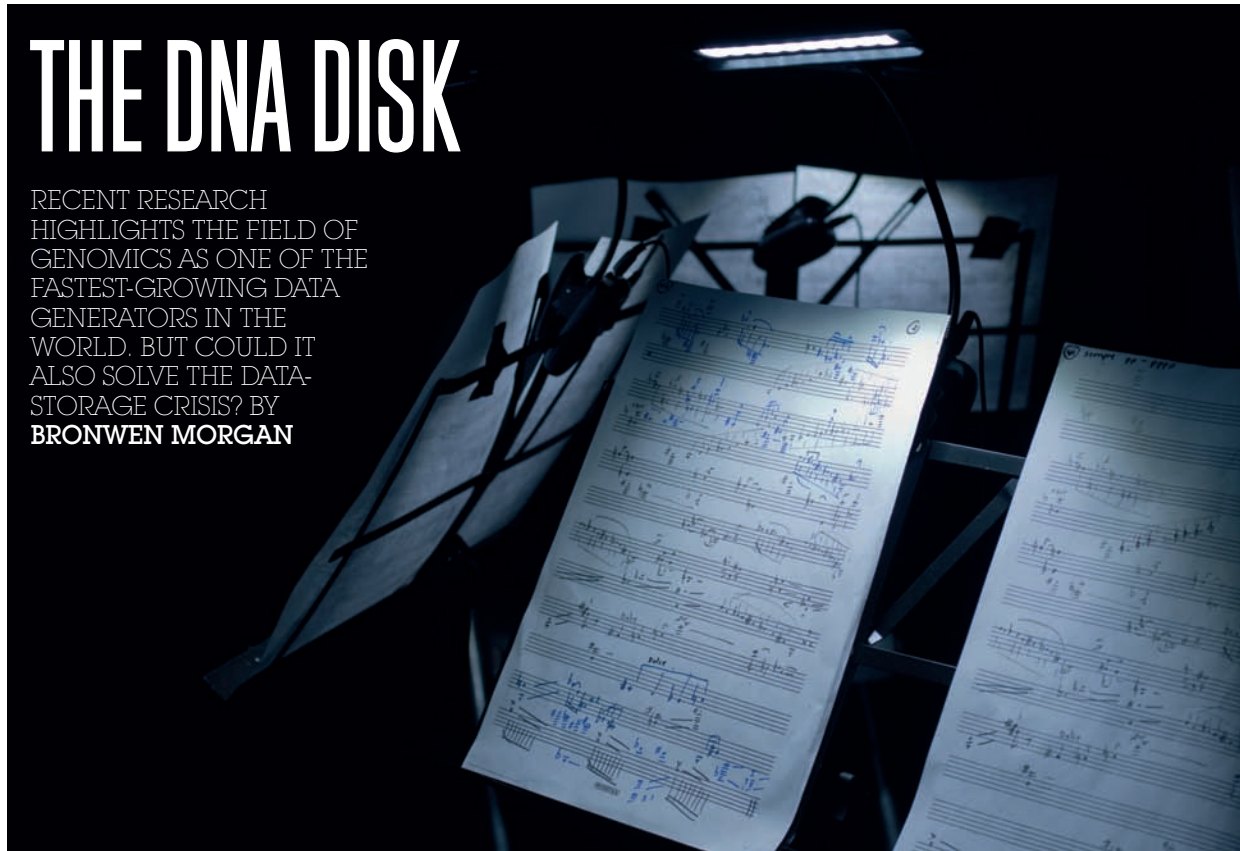
This contrasts with making acquisitions and doing buy-backs, which create faster returns, but usually cost more. Essentially, the former is acquiring market share over time, while the latter is paying through the nose for instant results.

It is interesting to note that fans of family-controlled businesses view the lack of liquidity in the equity as being more than offset by the certainty of dividend. Ironically, this does not suit the box-tickers. ■

Lorna Tilbian is executive plc director and head of media at Numis Securities

THE DNA DISK

RECENT RESEARCH HIGHLIGHTS THE FIELD OF GENOMICS AS ONE OF THE FASTEST-GROWING DATA GENERATORS IN THE WORLD. BUT COULD IT ALSO SOLVE THE DATA-STORAGE CRISIS? BY **BRONWEN MORGAN**



The amount of data produced worldwide in 2011 – 1.8 zettabytes (ZB) – would have filled 57.5bn 32GB Apple iPads; enough to build a Great Wall of China twice as tall as the original. This figure reached 2.8ZB in 2012 and is predicted to reach 40ZB by 2020.

One of the most prolific, and fastest-growing, data generators in the world is the field of genomics; the quantity of genetic data being produced on a daily basis is currently doubling every seven months. By 2025, genome scientists will have overtaken YouTube and Twitter – as well as reigning science data kings, astronomy and physics – as the leaders in data production.

In an ironic twist, however, the same field could also offer a solution to the approaching data-storage crisis. According to Dr. Nick Goldman, research group leader at the European Bioinformatics Institute (EBI), the 2.8ZB of data that would have resulted in an even bigger ‘Great Wall of iPads’ could be stored in just one cubic metre of DNA.

The idea for this novel storage medium emerged – as so many do – in a bar, where Goldman and his collaborator, Ewan Birney, director of the EBI, were pondering their own data-storage issues. It was around five years ago, and they had just come out of a meeting to discuss whether the institute would be able to cope – not just physically, but financially – with the ever-increasing volume of information being produced.

Much of the EBI’s activity, Goldman explains, involves storing “seriously large amounts” of genomics data and making it available to other scientists to download. “We’re not as big as CERN [the European Organisation for Nuclear Research],” he says, “but we’re up there with the major scientific set-ups.” As a publicly funded institution, the high cost of running the hard disks to store this

data was becoming a significant problem.

“We were in the bar after the meeting and we said: ‘If only we didn’t have to share all this information on hard disks, which cost a lot, go wrong and need replacing, and require electricity and cooling systems. Wasn’t there some other way we could store all this information?’ We were just joking around,” says Goldman. “Then we realised that DNA, which was the source of the information that had become our headache, is itself a digital information-storage medium.”

Goldman and Birney reasoned that, if genome information can be stored as a cell with DNA information inside it – rather than as a digital file – DNA could, conceptually, be used to store any other type of digital information.

“We realised from what we know from our everyday life, handling DNA sequences and experiments studying DNA, that we have all the

technologies that we need to use DNA to store information," Goldman says. "Basically, you need to be able to write a message into your medium; you need to store it – or move it around or make copies – and then you need to be able to read it back."

The process converts binary code – the zeros and ones that are the basis of anything stored or transmitted digitally – into the four letters that make up DNA: A, C, G and T.

A file of data stored as binary code will be turned into a long string of letters, and this is then broken into shorter sections with indexing information attached. This allows it to be put together again correctly when read back by the computer program.

A physical version of this DNA code is then produced – in a process comparable to inkjet printing, says Goldman – by a company in California, and shipped to the institute in test tubes. The DNA is essentially a powder, which is suspended as a liquid solution and, when freeze-dried, becomes a film on the surface of the test tube – much like if salt water was left to evaporate.

Goldman is keen to point out that – while they are, effectively, repurposing DNA – at no point does the process go anywhere near the genome of a living organism: "That worries some people, but really we're just using chemical molecules that have very convenient properties and that we are good at manipulating in laboratories."

The initial test of the process, in 2013, successfully stored around 1MB of digital information: all of Shakespeare's sonnets, an audio clip of Martin Luther King's 'I have a dream' speech, and a copy of Watson's and Crick's classic paper on the structure of DNA.

Goldman and Birney have subsequently worked with artist Charlotte Jarvis to store a recording of a string quartet – around 2.5MB of information – in DNA, which was then dissipated via children's bubble mix as part of a multi-sensory installation. "In theory, you could recover the music [from the bubble mix] if you have a lab handy," says Goldman.

Both of these trials have been genuine proof of principle that what started as a fun 'Friday afternoon science project' could be a viable alternative for the storage of digital information. The most appropriate application of DNA storage, says Goldman, would be for companies that need to archive a lot of information in the long term, rather than as a replacement for memory systems such as chips or hard disks in personal computers.



Goldman and Birney stored a recording of a string quartet in DNA, and then dissipated it via children's bubble mix

So far, Goldman has been approached by film-industry production companies looking to store archived films, energy firms wanting to store data from geological surveys, and CERN, among other interested parties. At the moment, he says, the bottleneck to the method going mainstream is the synthesis – actually making the strands of DNA – to their designs.

This apparently requires enormous improvements for the idea to be economically viable. But, he adds, this type of large-scale improvement is not unusual in genomics – the technology used to read a DNA sequence has improved "by a million-fold" in the past 10 years.

Saving space isn't the only benefit offered by the method, he says: DNA, and reading it, will never become obsolete. "DNA will last a really long time – and we know that from regular research studying evolution," he says. "I work with people that have taken samples from 700,000-year-old dead horses and recovered DNA successfully. And there will always be a reader: today's magnetic tapes won't work in 20 years because there won't be a reader, but there will always be readers for DNA because we will always want to read that information.

"The technology we use to do it will change, but the basic concept will be the same." ■



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STEVEN PINKER IN SEVEN

STEVEN PINKER, A PROFESSOR AT HARVARD UNIVERSITY, IS A RENOWNED EXPERIMENTAL PSYCHOLOGIST AND WRITER ON LANGUAGE, THE MIND AND HUMAN NATURE. HIS MOST RECENT BOOK IS *THE SENSE OF STYLE: THE THINKING PERSON'S GUIDE TO WRITING IN THE 21ST CENTURY*

1 You have written about a diverse range of subjects – how do you decide what to turn your attention to, and what do you want to cover next?

Steven Pinker: I like to say that, after writing a book about genocide, mass murder, world war, rape and torture (*The Better Angels of Our Nature: Why Violence Has Declined*), I decided it was time to write a book on topics that really get people emotionally engaged – namely dangling participles, split infinitives and beginning a sentence with 'because'. Seriously, there is a common denominator beneath all the subjects I write on: human nature. I have alternated between books that focus on language – such as *The Stuff of Thought* and *The Language Instinct* – and books on the rest of human nature, such as *How the Mind Works* and *The Blank Slate*.

2 Do you think the way language is evolving, and how we use it, has changed more in the past 20 years – with the advent of digital/social media – than in any similar-length period previously, or is change steady?

SP: I don't think we know the answer to that. Certainly English went through greater changes in the 12th century, when Old English became Middle English and absorbed thousands of

French words and constructions. And again during the 15th century, when Middle English morphed into Modern English, and our ancestors scrambled the vowels (making English spelling so illogical), lost the case system, stopped pronouncing 'silent' vowels, and other mutilations.

3 Which audience do you find it easier to write for – a general or an academic one, and why?

SP: An academic audience, by far. With an academic audience, you don't have to worry about clear and stylish writing, which takes a lot of work.

4 It has been harder to gain mass appeal for science subjects than for the arts because of the difficulty in explaining complex ideas to non-experts – but science appears to be becoming more popular. Do you think that's because scientists are explaining themselves better, or because the population now has a better level of science understanding?

SP: Both of those are true but, in addition, writing in the arts and humanities has become more obscure, and their underlying ideas more hostile to common sense.

5 In terms of your work on the reduction of violence, how much do you think social media – and the

immediate dissemination of information – make us think that dramatic or violent occurrences are on the increase?

SP: In the past, many acts of violence were trees falling in the forest with no-one to hear them. Today, the world contains more than two billion on-the-scene reporters: people with smartphones who can upload footage to the web from almost anywhere. This is bound to give us the impression that violence has increased.

6 Have you ever returned to an area of your research, or carried it on further, and changed your thinking profoundly, or found you had reached the wrong conclusion previously?

SP: Not one, single, dramatic recantation, but certainly many smaller ones.

7 You have talked about the pleasure that comes from insight – how do you feel when you hit on an insight or new concept? How do you celebrate?

SP: I start to write it up, to make sure it doesn't fall apart as soon as I make it precise. The celebration comes once the book or paper has been written, and I'm satisfied I've told a coherent story. ■

THE PERSUASION PRINCIPLE

WRITING AND DELIVERING A POWERFUL SPEECH IS AN ART FORM. COULD A SCIENTIFIC APPROACH TO SPEECHWRITING EVER BE AS EFFECTIVE? BY BRONWEN MORGAN

Some political speeches are ingrained in our minds, either by the significance of the occasion on which they were delivered, the eloquence of the speaker, or both. There's something about a rousing speech that can stir emotions in a seemingly indefinable way.

But Nick Beauchamp, an assistant professor at Northeastern University's Department of Political Science, in Boston, USA, believes he may have found a way to define the indefinable. He has developed an algorithm that, he claims, can build more compelling, convincing political speeches.

Beauchamp initially set out to get a better understanding of what makes people support or oppose issues by breaking down the political discourse around those issues, and working out which elements are likely to be welcomed or rejected by the public.

He chose to focus on the US's Affordable Care Act – also known as 'ObamaCare' – when developing his algorithm, as he says it's one on which many Americans still have fluid opinions. He started by feeding around 2,000 sentences from a pro-ObamaCare website into a model.

"The algorithm is given a large collection of raw sentences, and its job is to choose more and more persuasive three-sentence combinations," explains Beauchamp. "Just choosing sentences at random will neither make much progress nor give us insight into why those sentences happen to be more persuasive, so we need some way of systematising those raw sentences."

'We shall fight on the beaches, we shall fight on the landing grounds, we shall fight in the fields and in the streets, we shall fight in the hills, we shall never surrender'

'Ask not what your country can do for you, ask what you can do for your country'

First, the algorithm identifies the underlying topics in the sentences – clusters of words that tend to co-occur. For example, for ObamaCare, one topic has words such as ‘pre-existing’, ‘condition’, ‘coverage’, ‘plans’, while another has ‘employee’, ‘employer’, ‘business’ and ‘mandate’. The former, says Beauchamp, is a topic that tends to occur in sentences about how – if you have a pre-existing condition – you can no longer be denied coverage, while the latter tends to appear in sentences about being able to keep healthcare if you already receive it through your employer.

“Each sentence is then encoded – for example, as 20% Topic 1, 15% Topic 2, etc – and the machine then tries to find the most persuasive distribution of topics to guide which sentences to choose.”

Beauchamp then tests his sentence combinations; in the ObamaCare experiment, respondents were asked to read various combinations and indicate their approval of the issue on a scale of 1 to 9. Using this feedback iteratively, the system returned to its pools of topics to find more and more effective sentence combinations – which were, in turn, sent on to new groups for testing.

Beauchamp found that the two topics mentioned earlier (pre-existing conditions and keeping an employer plan) tended to be the most persuasive in favour of ObamaCare – those who read them tended to have higher approval levels when surveyed afterwards. Two other topics – about state/ federal relations and laws and rights – tended, instead, to push people away from approving of the issue. Within 90 minutes, Beauchamp had a collection of sentences with a 30% higher approval rating than the original text.

TAKING A GENERAL APPROACH

In theory, the algorithm can be fed any sort of sentences and have any outcome question you can think of. “It’s a very general approach, not at all restricted to politics,” says Beauchamp.

“One could just as easily feed the machine a bunch of sentences about a product and ask the subjects to rate their approval of the product as the outcome variable. The algorithm knows nothing about content – it would just go ahead and find the topics, then systematically vary them until it found the subset that best increased the outcome the researcher was interested in.”

What the method doesn’t cover – deliberately, Beauchamp insists – is rhetorical manipulations such as tone, emotion and syntax. In his experience, the effect of the tone is very much dependent on the subject matter and who is delivering the speech.

However, there is still room for the algorithm to incorporate the ‘wow’ factor that is so often present in the most powerful speeches.

“At the moment, this method doesn’t write the original sentences, it just collects them from elsewhere,” says Beauchamp. “So there’s still plenty of room for human-inspired ‘wow’. The ideal is that, while the process may be relatively boring for the participants – although, as it stands, each person only sees one chunk of text – the outcome could end up being something as surprising as anything crafted by a person. For instance, you could ask people how much ‘wow’ and surprise they found in the text, or how formulaic it seemed, then have the machine optimise that.

“There’s no reason you couldn’t end up with something even more impressive than the standard product of a copywriter. Although, as with all computer-generated content, it’s unlikely that the automated approach will beat the best human practitioners any time soon.” ■

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THE PROMISE AND THE PERIL OF THE DIGITAL SCREEN



ANY COMPANY RELYING ON WEBSITES AND SCREEN INTERACTIONS FOR BUSINESS SHOULD TAKE NOTE OF THE RESEARCH THAT **SHLOMO BENARTZI** HAS DONE, WHICH HE EXPLAINS IN HIS NEW BOOK *THE SMARTER SCREEN*

Digital screens are now integral to our daily lives. But despite our familiarity and, invariably, our reliance on them, the medium can affect our interactions. Indeed, the way we think when we go through processes via a screen can be considerably different to how we respond in other forms of interaction.

In his book *The Smarter Screen – what your business can learn from the way consumers think online*, Shlomo Benartzi, professor and co-chair of the behavioural decision-making group at UCLA Anderson School of Management, explores online behaviour and shares his research into how people think differently when using screens. He spoke to *Impact* about his findings.

Impact: Has the speed of processing always been faster on screens, or are people getting faster the more they become used to screens?

Benartzi: Although people have always relied on fast judgements, the online world seems to be especially reliant on these speedy assessments. For instance, there's good evidence that we make important decisions about which websites we prefer – they are more visually appealing – within 50 milliseconds, or 1/6th of the time of a human blink. We aren't aware of what we're responding to so quickly – it's usually a mixture of colour choice and layout complexity – but it still

TOP10...

TOOLS FOR TRIGGERING BEHAVIOURAL CHANGE ON SCREENS:

- 1 Factor in the attention environment
- 2 Use information-compression techniques
- 3 Maximise visceral beauty
- 4 When in doubt, err on the side of simplicity
- 5 Optimise the use of hotspots
- 6 Make us feel the feedback
- 7 Use cognitive disfluency to slow down the mind
- 8 Offer a manageable consideration set
- 9 Create thinking tools
- 10 Use science to drive your design and A/B testing

shapes our ensuing decisions about the website, including how much we trust it.

Impact: What are the key differences between screen types – how do touchscreens affect behaviour compared with other types?

Benartzi: While there is some suggestive data showing that people think more superficially on an iPhone compared to a laptop, I think one of the main effects of touchscreens concerns the endowment effect. When people shop on a touchscreen, they feel more attached to the objects they are looking at. According to one study, touchscreens can increase how much shoppers value a given item by nearly 50%, at least compared to people browsing on a laptop.

Impact: The anonymity of a screen seems to help in some situations (healthcare), but not in others (over-ordering in restaurants); what can brands do about this? Is it always a case of understanding the need to be sector- or occasion-specific?

Benartzi: I think one needs to always think about each task. Instead of speculating in general about the digital space, my goal is to develop strategies that allow us to maximise the upside and minimise the downside of technology with respect to different tasks.

Impact: You have talked about the digital reading gap; why do people read less well on screen than on paper?

Benartzi: It's still not totally clear what's causing the digital reading gap, but one possibility is that screens make reading too easy, encouraging our eyes to skim over the text. The end result is that we remember less of what we read. This helps explain why people tend to read and remember better when they are given texts in so-called disfluent fonts, such as **Comic Sans**. The unfamiliar print slows them down. I wonder if we should experiment with similar techniques in the digital world.

Impact: What are the implications for market researchers as more survey information and data are being collected through mobile devices?

Benartzi: It's a pretty consistent finding that about 50% of all participants in scientific experiments fail basic tests of attention on screens. This means that roughly half of the data you are paying for is not very useful, as the participants are too distracted.

Impact: Does it mean they will actually get the wrong answers (thinking about the research where those answering financial knowledge questions on an iPhone were more likely to get it wrong)?

Benartzi: Yes, that's one direct implication. People who aren't paying attention are going to give you answers of much lower quality.

Impact: What are the most important aspects of screen behaviour that companies should think about when designing their websites or screen-based customer interaction?

Benartzi: I think we need to design our websites for a world in which customers make fast judgements and have very little attention. This tends to mean more colour and less complexity. I also think we should do a better job of leveraging the screen-location effect, which refers to the fact that people are far more likely to choose items in those parts of the screen where their eyes land first. We should put

THE SEVEN HABITS OF EFFECTIVE DIGITAL FEEDBACK

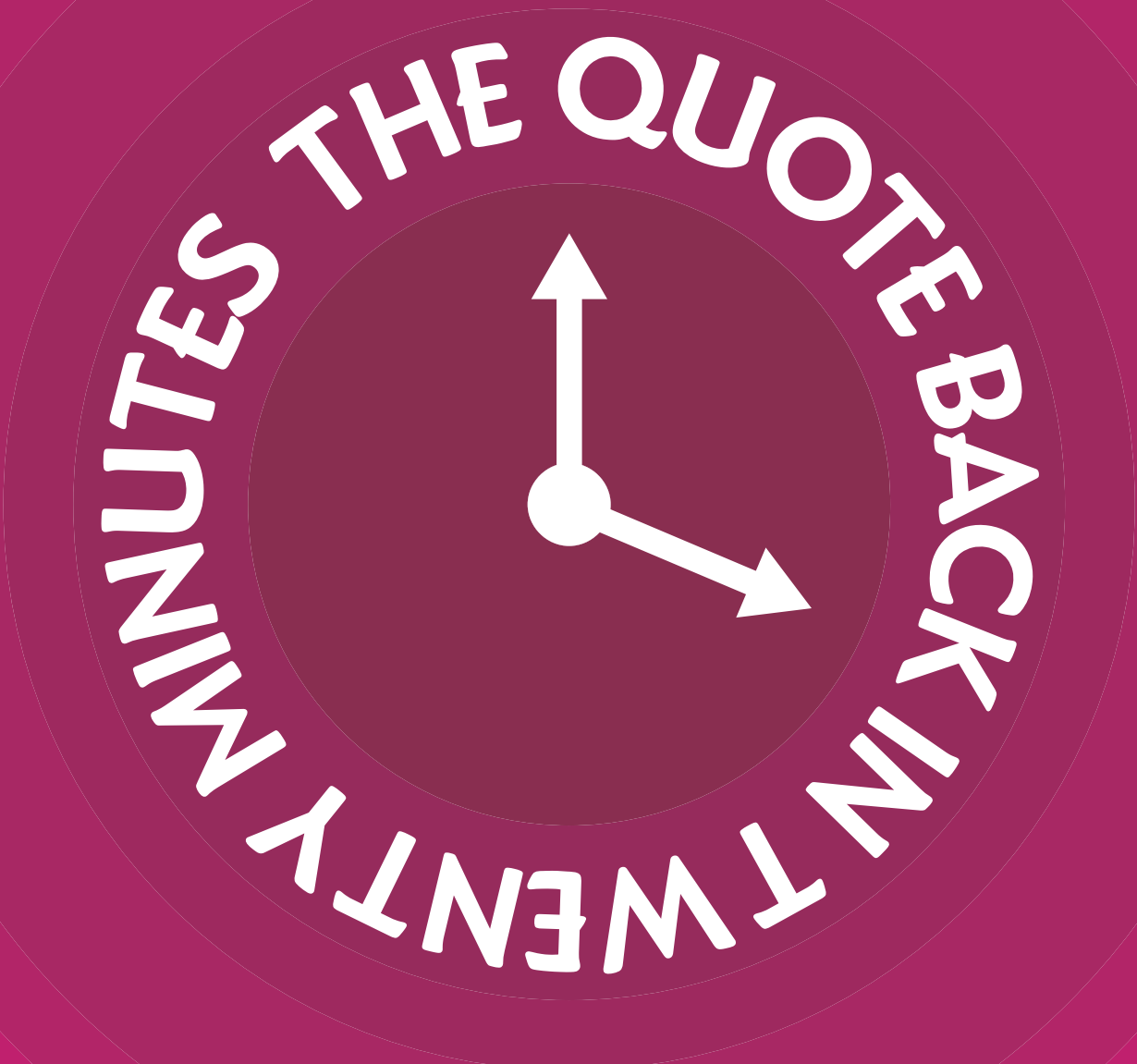
- 1 Time it right – feedback has to arrive at the right time to have an impact.
- 2 Make it personal – the best feedback begins with effortless measurement, with devices so subtle we forget we're even being watched.
- 3 Avoid feedback overdose – we're not looking for devices that simply give us more feedback, or track everything about our lives; we're looking for ones that cut through the clutter and tell us more with less.
- 4 Trigger a feeling – use a system of gradual escalation, making sure the tone of the feedback reflects the urgency of the situation.
- 5 Incorporate an action plan – better to offer feedback that gets people to think.
- 6 Encourage, don't criticise – make it about the task, not the person. Keep it gentle and future-oriented.
- 7 Follow the evidence – all digital feedback must be thoroughly tested; we need feedback on our feedback.

the best choices where people are already looking.

Impact: Of all the studies you have looked at, and the research you have done yourself, what was the most surprising aspect of behaviour with digital screens that you came across?

Benartzi: I would have to say I was most surprised by my studies with Yaron Levi of users of the Personal Capital app. It's a simple app that gives people easy access to all of their financial information on their smartphone. What we found is that simply giving people the app – even when they were already using the website – allowed them to reduce their spending by more than 15%. That's a huge change in behaviour, and it was triggered by a single download. Such results are a reminder that these digital tools can really change our lives – at least if we design them correctly. ■

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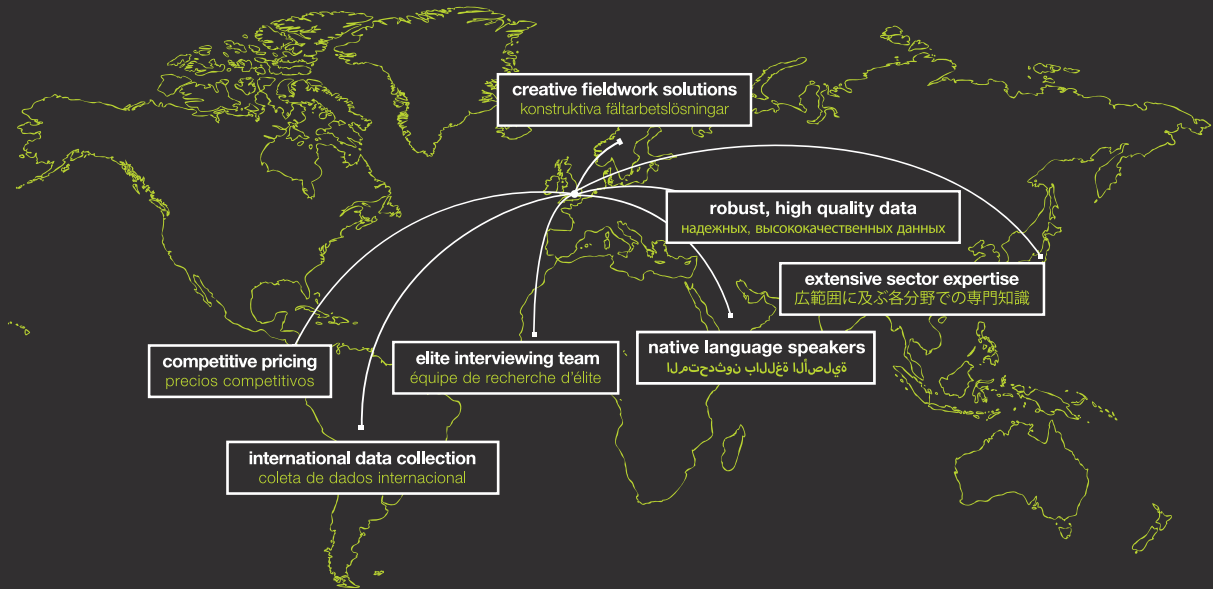
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IT'S NOT THE POLICIES, IT'S THE CULTURE THAT COUNTS

ANNA CLIFFE SHARES HER FIVE POINTERS FOR HOW TO CREATE A BUSINESS CULTURE THAT ENCOURAGES BETTER FEMALE REPRESENTATION AT ALL LEVELS OF THE MARKET RESEARCH PROFESSION



There's a widespread belief that women outnumber men in market research; that we're *much more suited* to understanding people; that it's the perfect career for women. Is that true?

I do believe there is a certain type of person – both female and male – that market research attracts. Thoughtful; articulate; maybe even a little bit introverted. Perhaps the stereotypical 'alpha male' workplaces aren't found quite so often in market research – it's not like working in the City or in law. But it's a lot subtler, and more complicated, than that in the real world of market research.

If we take a good look at the make-up of market research agencies, we can see some patterns emerge. We have lots of female graduates coming into the industry. We have many talented women who deliver fantastic work through to senior levels. But at the top end of the industry – and especially in the bigger agencies – men seem to take the lead again, especially in board-level positions. Why is this?

Of course, we can argue that market research is no different from any other industry in the UK. FTSE 100 companies have faced this issue head on, and the percentage of women on their boards has doubled in the past four years... to 26%. A fantastic step forward, but

still poor when we consider that women make up 47% of the workforce.

Small and medium-size market research agencies may be the exception to this rule. If we look at some of the outstanding smaller agencies in the UK, we see women well represented as owners and directors.

I own one of these agencies. Taking the time to talk to some of my fellow female researchers, the overwhelming response – particularly from the younger women and those without children – is that market research is actually a great industry to be part of for women. This quote was typical:

"To be honest, I've never felt that my gender has got in the way of me progressing in my career – in fact, sometimes it's been a benefit – I think sometimes women are seen as more empathetic, more suited to research somehow."

So there's no problem? Well dig a bit deeper, and other women have different views. This from a researcher talking about a previous role:

"It's not that the agency had bad policies... it was just that the whole feel of the place wasn't that family friendly. Because there weren't any women with kids in more senior positions, the culture was predominantly: 'of course we can work late'. My boss said they understood when I had to leave at 5.30pm on the dot every night... but I could just tell they thought I wasn't really putting my heart into it. It wasn't true."

For me, the argument is economic – pure and simple. At a time when our industry isn't attracting or taking on as many graduates as it used to, it's more important than ever that we keep the talent that we have.

What's the point of training and developing great researchers, only to lose them in their 30s, when the reality of child rearing hits home? At this stage in their career they are just getting into their stride, building strong relationships with clients and, quite frankly, earning lots of revenue. Why would any agency want to risk losing that?



So here are some thoughts on the cultural and practical things agencies can do to encourage women in our industry – both in general and post-children:

1 LOOK BEYOND THE POLICIES

Of course HR policies need to be 'on point' – and followed through. But beyond this, what's the culture like at your agency? Does it genuinely encourage diversity? Are there examples of men and women in different roles? Do the most senior people in the company genuinely behave as if gender doesn't matter? Do they assume that 'women do retail research' and 'men do B2B'?

2 EMPOWER AND TRUST

Working parents have ties; it's impossible to get past that. But, in my experience, they want to work around them. They might not be able to stay late in the office, but they can pick up that final presentation read-through after the kids have gone to bed. Trust them to make the decisions on how to get the work done – and reward people for results, not time at their desk.

3 USE TECHNOLOGY

Technology allows us to be flexible – and, for working parents, that's a boon. There's no excuse not to use technology to allow flexible working to happen.

4 ROLE MODELS ARE KEY

Have women in senior positions and you're likely to get more out of them. Open the door – make it seem possible. Sometimes this is just about being open-minded as to what people can become, and not pigeonholing.

5 POSITIVE MENTORING

Lots of women have told me how much of a difference this makes – a friendly ear, a bit of advice. Whether it's juggling childcare with doing focus groups, or advice on how to make your voice sound authoritative in a room full of men, someone will have gone through this before. Ask your senior women to take on this role.

For me, it's about ensuring that every researcher – male or female – reaches their potential. We need to challenge ourselves to make sure that happens; it's beneficial – not just to them, but to our industry as well. ■

Anna Cliffe is joint managing director at Trinity McQueen

GOING BEYOND THE GILDED CAGE

TO UNDERSTAND BETTER HOW GENDER STEREOTYPES MIGHT IMPACT ON MARKET RESEARCHERS' CAREERS, WOMEN IN RESEARCH (WIRe) LOOKED AT NONCONSCIOUS GENDER PERCEPTIONS. **ELINA HALONEN** SHARES THE FINDINGS

A father and son are in a horrible car crash that kills the dad. The son is rushed to the hospital and just as he's about to go under the knife, the surgeon says: 'I can't operate – that boy is my son!'

An old riddle such as this is a good example of the impact gender schemas can have on our thinking. Most people are puzzled by it, and suggest wildly creative options instead of the most obvious one: that the surgeon is a female and the boy's mother.

One particular area where these stereotypes come into play is career choice, progression and recruitment. Everyone likes to think of themselves as enlightened, but we all store a range of belief patterns in our minds. We learn these schemas in childhood because they help us generalise and explain life, even though they do not necessarily reflect our personal values.

Despite what many think, gender stereotypes do not just affect women: when the riddle was changed, most people struggled to imagine that a nurse could be a man. The perceptions we have of each gender in a career context include many small things that can hold both men and women back – but only if we are not aware of them.

To find out what perceptions market researchers might have,

Women in Research (WIRe) and the Market Research Society (MRS) asked the Irrational Agency to explore nonconscious gender perceptions in the market research industry through a wide-scale experiment. Before we reveal the findings, why should we care about these stereotypes?

WE CAN'T HELP BUT BE PREJUDICED

The truth is that we are all cognitive misers, who like to preserve mental energy and processing capacity, and only spend it when we really have to. All human thought is a trade-off between speed and accuracy. While we mostly accept that we have fast and slow ways of thinking about brands, we can also apply it to how we perceive people.

In the first stage, our automatic, effortless System 1 uses heuristics and other mental shortcuts to grasp the essence of whatever we are presented with. Unfortunately, research suggests that we don't even need to believe in a stereotype for it to affect our thinking. The second stage of perceiving people – in which we correct and suppress our prejudices – takes much more effort, so falls into the realm of System 2, which the cognitive miser would prefer to avoid altogether.

Just as we can't help but make snap judgments about brands and products, we automatically make snap judgments about people – whether we like it or not. We can't stop ourselves from being influenced by stereotypes, even if we want to; they are our way of making sense of the world. Thinking that we are immune from stereotyping only makes us more likely to fall prey to it, so our best chance is to accept it. But before that, we need to be aware of the prejudices we have.

To dig into nonconscious beliefs and perceptions, we designed a three-stage experimental study that was distributed to the MRS membership. The approach was unusual: whereas a standard survey would follow MRS guidelines, giving respondents an option not to express their opinion, we deliberately wanted to force a System 1 response, by using a series of time-pressured choices to dig right into the nonconscious beliefs. With some studies suggesting that recruiters spend as little as six seconds looking at a CV before making an initial decision, quick first impressions really count. We also reviewed academic and mainstream articles on gender equality to put together hypotheses, and adapted examples into a market research industry context.

In the first stage, we wanted to replicate the Heidi/Howard case study from Harvard Business School, which found that people will rate a person's CV differently



depending on their gender – even though both were rated equally competent, the woman was perceived as more aggressive and less likeable than the man. We deliberately asked explicit rating questions, expecting respondents to second-guess the purpose of the survey, aiming to tap their rational System 2 responses. Predictably, the female candidates were rated more positively, which is either very good news for women in market research, or evidence that we like to give the impression of being unprejudiced, and overcompensate for it when put under the spotlight. Luckily, we also had nonconscious measurement tools that can read beyond rationalised answers and tap into unconscious beliefs and feelings.

A lot has been written recently about the likeability-competence dilemma women face – apparently we can either choose to be liked or competent, but not both. Similarly, the language used to describe people has received attention: some have suggested that women are described as bossy where men are simply assertive; and that women can also sometimes undermine themselves with the words they use.

When we asked which words are most complimentary in a performance review, we discovered that the ideal market researcher would be clear-thinking, creative, organised, have initiative and be analytical. However, gender differences appeared: women appreciate ambition, taking the initiative and being independent and self-confident much more than men, who value a decisive, enterprising, serious approach. But which gender are these traits associated with?

When we looked at both the perceived tone of the word (positive/negative), and the gender it was most associated with, we found that the positive male stereotype is analytical, enterprising, confident, decisive, logical, self-confident and rational, whereas a positive female stereotype is more clear-thinking, creative, organised, takes the initiative and curious.

Women are also seen as inventive and realistic, as well as more tactful and friendly – in general, more positive words are associated with women than men, with the most negative attributes being sensitive and emotional. On the flipside, less positively described men might be called ambitious, assertive, direct and serious –

but also bossy, abrasive and arrogant.

Overall, men have more balanced views when it comes to either gender, while women have much stronger gender associations for traits. Contrary to much of the mainstream media reporting, market research appears to rate women rather highly.

However, gender perceptions can be much more subtle and complex than just specific traits – often, certain behaviours are more credible for one gender than another. Stereotypes are often thought of as simply discriminatory, but going against a stereotype can also damage people's perceptions of you; for example, research has shown that being perceived as creative will diminish a leader's perceived effectiveness because the stereotypes are seen as contradictory.

SO WHAT QUALITIES DO WE VALUE WHEN HIRING NEW PEOPLE?

When we asked which descriptions in a recruitment agency cover letter would make it more likely that someone would be invited for an interview, the most valuable things employers are looking for are: an ability to manage complex projects; being down to earth and smart; the ability to combine techniques and approaches; and a creative and passionate researcher with a track record of developing business.

As stereotypes often reflect patterns we have observed in real life, men are more likely to be seen as leaning towards quantitative – and women towards qualitative – methods. However, men are also more likely to be seen as strong on statistics and growing businesses, and women as creative, passionate and versatile researchers, as well as being organised and skilled in project management.

'Softer' people skills – such as being friendly and approachable – are firmly female territory, as is

▶ appreciating a work-life balance and the societal impact of their work, while men and women each see their own gender as being more down to earth and smart.

While this sounds fairly positive for everyone, a deeper look at the data reveals that even women are more likely to see assertiveness and ambition as male qualities – as well as seeing men as more likely to have grown a business and been promoted quicker. So while women are perceived to own many of the qualities we value in researchers, business acumen is still a male trait – even if you ask women. Making things worse, women are also much more likely than men to see a desire for a work-life balance as a typically female behaviour.

It's clear that market researchers are a very enlightened bunch when it comes to gender perceptions and – unlike in many industries – qualities associated with women are valued.

While this is great news for diversity, we shouldn't lull ourselves into a false sense of security that gender equality is not a challenge for us; both men and women put themselves – and each other – in clear boxes. These perceptions can make us miss existing talent inside our companies, as well as when we are recruiting for new people.

Nonconscious stereotypes can indeed be valuable guides in navigating a complex world, but we should not let ourselves become blinkered. ■

Elina Halonen is co-founder & partner, The Irrational Agency. Further details of the research methodology can be found at www.theirrationalagency.com/wire-mrs

Women in Research (WIRE)

is a global, non-profit for women in the greater marketing intelligence industry.

www.womeninresearch.com

THE JOB MARKET CAREER DEVELOPMENT NOW AND THEN

As the Market Research Society celebrates its 70th birthday, Sinead Hasson takes a look at how career development has changed.



The problem with writing about career development 70 years ago is that I'm far too young to hark back to 1945. My time in market research (swallows hard) dates back to 1996, which, for this piece, is – I think – quite far enough, thank you very much.

Twenty years ago, market research agencies were after people skilled in classic qual and quant methodologies, who could efficiently execute a research brief, usually for others to interpret. Such methods could, by and large, be learned academically and applied vocationally, giving junior researchers a fairly linear and well-defined career path to pursue. Back then, 'insight' was rarely mentioned. Field-based research was the mainstay, which required mobilising teams to get out there and engage face to face with consumers.

Today, demands on researchers are more complex and more strategic, needing the career-minded to adopt a vastly different outlook. The digital revolution has enabled a whole new level of data collection, community engagement and analysis, fuelling global demand for research services, and giving market researchers the chance to reinvent their profession. It has worked, too. The value of market research has been recognised and elevated in the wider business. As a result, more is being asked of the function than ever before – something that has immeasurably broadened the career options for market research professionals.

But options can also breed confusion; not everyone responds well to a blank piece of paper. Entrepreneurial researchers are flourishing, bravely exploring the digital landscape and jockeying with digital marketers, advertisers, creatives and communications professionals to carve out their value-niche in today's hyper-connected world.

“Take comfort in the fact that nothing can replace experience... get noticed, roll with the tech and don't rob yourself of opportunities by failing to get stuck in”

Social media, particularly LinkedIn, plays a huge part in today's career development. A strong, vocal and articulate presence online demonstrates your digital skills, which is essential for anyone focusing on big data, online insight or social media analytics. And let's not forget that the 'techies' are also here, building their strategic influence and threatening traditional market research with data mining, predictive analytics and machine-learning techniques.

Change is today's constant. What's in today is out tomorrow. As clouds of available research data billow to unimaginable proportions, and automated robots threaten traditional methods, today's smart researchers will conclude that they have little choice but to climb aboard the bullet train and embrace change as the new normal.

Luckily for me, we don't need to go back 70 years to discover market research's biggest transformation, which has occurred in the past 20. What is important now is that we, as researchers, continue to question our existence and justify our commercial value, because a slew of new competitors – all of whom have a seat at our client's table – are doing this already. Take comfort from the fact that nothing can replace experience – and remember that knowledge is power. Get yourself noticed, roll with the tech and don't rob yourself of opportunities by failing to get stuck in, because yesterday's market research is different from today's, which will be different again from tomorrow's. Count yourself lucky – this is no backwater profession.

Sinead Hasson @SineadH is the founder and managing director of recruitment consultancy Hasson Associates.

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GENDER IDENTITY

The Market Research Society (MRS) issued its first Code of Conduct for the research industry in 1954. Since then, we have led the way, with high ethical standards that place the wellbeing of research participants and the integrity of their data at the centre of the research process. As MRS celebrates its 70th year, it is timely that our research community maintains its positions at the forefront of societal change by encouraging approaches to recording of demographic information that cover gender identity.

Traditionally, researchers collected demographic information on biological sex with a standard 'male', 'female' (and perhaps 'prefer not to say') options. This approach must now change. All research participants need to feel equally valued and satisfied that their voice is being heard. Allowing participants to express their views in the way that they prefer is explicitly set out in the MRS Code of Conduct – and this also applies to describing their gender. So researchers should take steps to ensure this information can be recorded appropriately.



DATA COLLECTION NEEDS TO REFLECT PEOPLE'S VIEWS ON THEIR OWN GENDER IDENTITY – WHICH MAY NOT CORRESPOND WITH THEIR BIOLOGICAL SEX, EXPLAINS DR MICHELLE GODDARD

WHAT IS GENDER IDENTITY?

Gender identity is complicated. It is the way that an individual describes themselves and identifies with a gender category. A person's identity may or may not correspond with their biological sex, and is quite separate and distinct from their sexual orientation. It is also not fully covered by the standard 'male' and 'female' categories. The wide range of non-binary gender identities means that some people may identify as male or female and some may identify with an alternative third-option gender identity. In short, gender identity may not be static and it can be complex.

SHOULD YOU COLLECT THIS DATA IN LIGHT OF THE PRIVACY AND METHODOLOGICAL ISSUES?

Privacy issues, always at the forefront for researchers, may arise because:

- Participants may not wish others to be aware of how they self-identify. The place in which data will be collected, the purpose for which it is to be used, or the level of guarantees on confidentiality may pose concerns for participants.
- Collecting information that discloses gender reassignment surgery is likely to be considered as sensitive personal data under the Data Protection Act 1998, requiring further conditions for lawful processing reflecting the nature of this type of information.

Methodological concerns of the effects on the robustness of research include:

- Risk of inaccuracy and concerns that individuals – in completing open-ended questions – may give deliberately misleading, wrong or inaccurate responses, and lead to bias in the data.
- Lack of baseline information. There is presently no consistent approach on collection of gender identity data and most studies do not currently capture this demographic information, or include measures to identify transgender and other gender minority participants.
- Possible adverse impact on male/female quotas for nationally representative samples.

SUGGESTED STEPS TOWARD BEST PRACTICE IN GENDER IDENTITY DATA COLLECTION

First, the minimum expectation for any research project should be that the participant will be able to proceed through the research without being required to tick 'male' or 'female' if they do not identify as such. Even if you are working to



male/female quotas for nationally representative samples, the low proportion in additional gender categories should not significantly affect this.

Second, try different avenues for capturing information in a way that allows participants to express their views – such as including male/female and ‘other’ (as a free field), allowing people to self-identify by asking an open-ended question, or adopting a two-step approach that covers assigned sex at birth and then current gender identity.

Third, sensibly adapt the question and approach to the type of data-collection tool used, as different techniques will work better in online self-completion surveys such as in telephone interviews. Thought, foresight and a degree of flexibility will help make this work.

Fourth, encourage clients to consider whether the demographic information is relevant or, alternatively, if the research project could benefit from more explicit gender-identity questions. Projects collecting equality information or investigating issues where there may be a particular impact on this section of the population – such as bullying, workplace harassment, discrimination in employment, access to health and social care, and homelessness – may wish to target this minority population. In all cases, obtaining informed consent from participants to collect this sensitive data is critical.

Fifth, as an industry we need to work with others for change. Best practice in this area will need to build on the position and practice of the Office for National Statistics, and the

research carried out by the Equality and Human Rights Commission, to design and implement a consistent – and standard – gender-identity question that can be understood and answered by all people living in the UK.

So how should MRS researchers start this 70th-anniversary year? By celebrating standards that are fit for purpose, promote equality across a wide and diverse demographic base, and that recognise the right of participants to express their preferred gender identity accurately.

MRS will be issuing guidance on this subject, so stay up to date and read our website for further information on evolving best practice in this area. ■

Dr Michelle Goddard is director of policy and standards at MRS



Curiosity, insight and revolution

This year marks the 70th anniversary of the creation of the MRS – and the key purpose of any anniversary is to celebrate; 2016 is the research sector's turn.

Market research is fascinatingly interwoven with the economic and social history of the UK. At its heart, it is about giving people a voice, and providing achievable insights for the commercial sector and public policy. We are magpies, relaying and adapting the newest ideas from psychology, neuroscience and technology in the service of this purpose.

Market research is an industry founded on a fundamental need to know 'why?'. There is a joy in that question that is entirely human. Curiosity drives the researcher.

Insight is not just about the 'light bulb moment' that changes a product – although that is important; it is also a process that helps governments interact with human beings. Maybe that sounds grand, but the research I have done over my career has brought me face to face not only with the statistics, but with the reality of how difficult things can be for people. It's a humbling experience. It is also equally satisfying to turn insight into numbers that sway accountants and finance directors.

Market research is a sector that we should be proud of and hear more about. The UK is a world leader and, per capita, is the global No 1 for market research. In 2016 we have the opportunity to recognise and celebrate the sizeable contribution that the research sector has made to business, society and life.

Curiosity is where we begin. Insight is what we do. Revolution is the change we can bring.

With values and purpose such as these, we should not only celebrate what we have achieved to date, but constantly challenge our standards, techniques and delivery for the future.

Adaptation, innovation and collaboration should be part of our checklist for the future. I am curious to see what we make of it all.

Jane Frost CBE, chief executive, MRS
jane.frost@mrs.org.uk



70 years of helping people talk to power

YOUR SOCIETY

Did you get a platinum ticket in your magazine?

Instead of celebrating Christmas this year, MRS staff spent the holidays hiding 70 platinum tickets between the pages of 70 copies of this issue of *Impact* magazine. While only half of that sentence is accurate, the truth is that – without the funding from our members – the MRS won't be able to continue to protect, promote and connect the research sector for another 70 years. So we wanted to say thank you, not just for being a valued MRS member, but also for the hours of unpaid time that members dedicate to our many initiatives, networks, boards and working groups.

If you find a winning ticket in your copy of *Impact*, it can be redeemed – using the printed code – against any MRS one-day training course or one-day event (including a single day of the MRS Annual Conference) scheduled to take place in 2016. See the ticket for full terms and conditions.

What else is happening in 2016?

Celebrating the anniversary will be a recurring theme for many of our events and initiatives throughout 2016. For the latest updates on our anniversary plans for 2016, visit mrs.org.uk/seventy

Special platinum 70th logo

During 2016, the MRS will be displaying a special platinum 70th anniversary logo instead of the official 'Evidence Matters' one, which will return in 2017. Members and company partners who use the MRS logo (on websites, email signatures, business cards etc) do not need to update it. If you do want to use our 70th logo please contact info@mrs.org.uk

Calendar

Member events

January

20 – Members' evening: Building brands for the subconscious

28 – Members' evening: Geodemographics for marketers

February

10 – MRS Policy Unit Event

25 – MRS Advanced Analytics Symposium

March

10 – Members' evening: Automotive research

Training highlights

February

10-11 – Statistical Methods Masterclass

Understanding statistical techniques will transform your ability to use research data and deliver insight to clients.

24 – Introduction to Gamification

Understand how gamification works and how it can be used to electrify surveys and boost response rates.

March

1 – Coaching Skills for Researchers

Discover how researchers can use coaching skills to build stronger relationships with colleagues and clients.

2 – Infographics and Data Visualisation

Learn how to create your own still or moving infographic/visualised data confidently.

8-10 – Essentials of Qualitative Research

From briefing and research design, through to fieldwork and analysis, and the presentation of the findings.

17-18 – Winning the End-Game Masterclass

Delight clients by applying leading-edge sales, marketing and communications skills to your proposals.

Conferences

28 January

Kids and Youth Research

25 February

Consumer Health and Wellbeing

7 March

Can Big Data Replace the Census?

15-16 March

Impact 2016: MRS Annual Conference

Find out more at mrs.org.uk/events



Bringing *Impact* and Research Live closer together

The world's leading website for research and insight news and features has undergone a radical overhaul. We have created a state-of-the-art digital home for all the in-depth content contained in this magazine, as well as the latest topical news featured regularly on Research Live. With *Impact* securing several industry awards, we wanted to ensure

that you could readily access the cutting-edge content online, as well as through the much-loved printed version.

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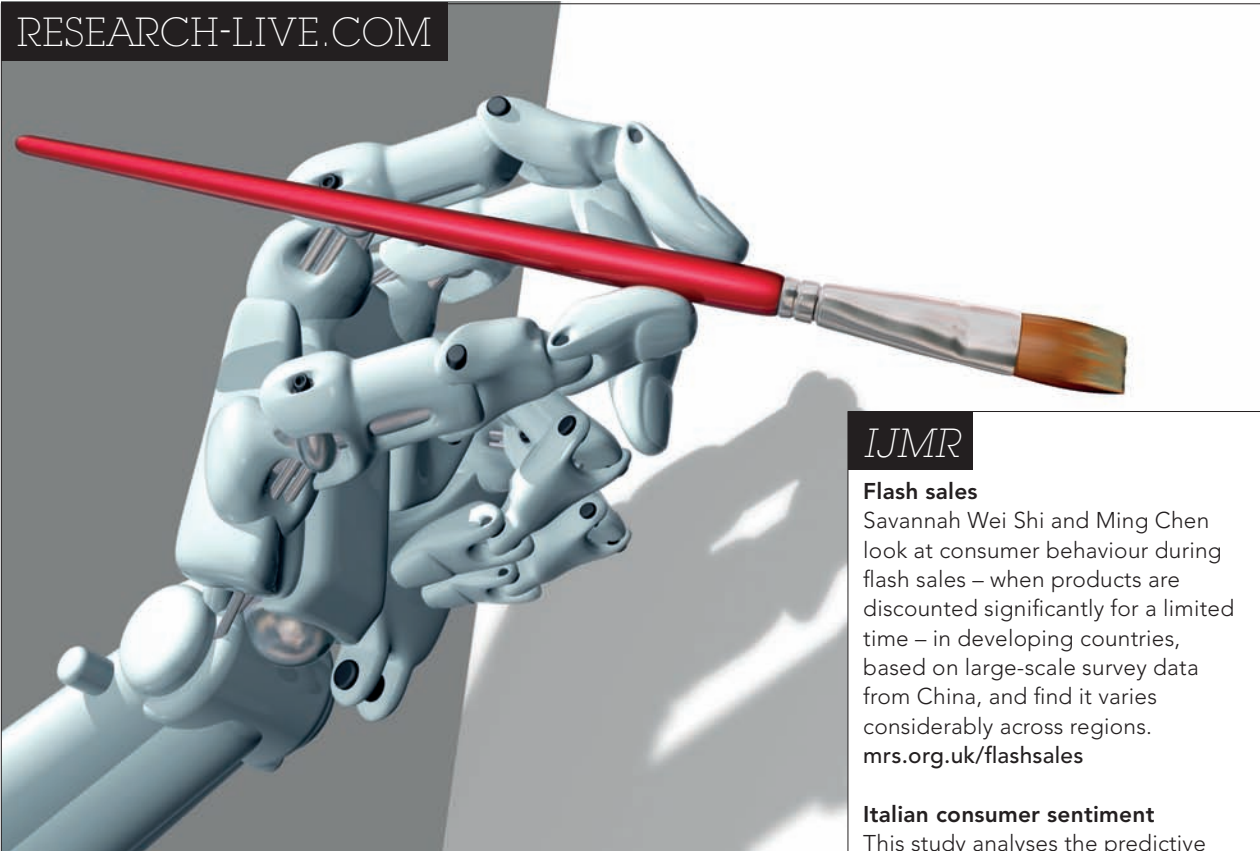
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Where next?

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

RESEARCH-LIVE.COM



Art and science of advertising

A Debating Group event at the House of Commons pitched VCCP's Charles Vallance against VivaKi's Marco Bertozzi, to debate the motion: 'Science is squeezing out the art in advertising.'
www.research-live.com/artandscience

Do feelings betray thoughts?

In light of reporting of public sentiment about the refugee crisis, Martin Boon's blog looked at how implicit reaction testing can dig deeper than question-and-answer based data into public attitudes.
www.research-live.com/IRT

Relationship building

Bigfoot Consulting's Paul Tredwell started his regular blogs on client/agency relationships by exploring why research agencies need to be ready to participate and share thinking with clients, if they want to break out of project-based relationships.
www.research-live.com/relationships

2016 global trends

Seven themes, trends, disruptions and behaviour changes affecting consumers around the globe, from insights and trends consultancy Future Foundation's Trending 2016 conference.
www.research-live.com/trending2016

IJMR

Flash sales

Savannah Wei Shi and Ming Chen look at consumer behaviour during flash sales – when products are discounted significantly for a limited time – in developing countries, based on large-scale survey data from China, and find it varies considerably across regions.
mrs.org.uk/flashsales

Italian consumer sentiment

This study analyses the predictive capacity of the Index of Consumer Sentiment (ICS) – a leading index in international market research – in Italy, before and after the global financial crisis. It looks, in particular, at household consumption and people's strategies for coping.
mrs.org.uk/sentiment

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Think Happy

was presented by Karen Schofield & Kelly McKnight as part of the award-winning MRS session, 'Empathy, humanity, happiness & haulage'. Contact us to discuss the paper: info@jointhedotsmr.com