

IMPACT

ISSUE 7 OCT 2014

USING EVIDENCE & INSIGHT TO MAKE A DIFFERENCE

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Unilever's Keith Weed

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How the changing patterns of TV viewing are affecting measurement

Stage struck

Using statistics to sell stories at the RSC

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Sustaining life



Jane Bainbridge
Editor

Companies, and by association their brands, go through phases where they focus on bigger picture – macro strategies. These aren't the everyday, nitty gritty of marketing – the price points, advertising and promotion mix and ongoing customer insight work – but the longer term, broader agendas.

We've had globalisation, and the desire to be all things to all nations; the environment, with each trying to shout louder than the next about their – and I shudder as I use these words – 'environmentally-friendly' credentials; and more recently, social media, where brands battle it out with their claims of social networking prowess, replete with viral videos and Twitter streams to prove the point. And these are just a few.

Social media aside, one of the current 'marketing movements' rising up the agendas of many businesses is that of sustainability – the natural successor to the green wave, but more all-encompassing and strategic. Or, at least, it should be.

It's all too easy to become jaded and cynical about the claims that brands make, especially when they crank up the PR machine to churn out constant reminders of how great they are and how earnestly they are addressing the issue.

But every so often, one stands out from the melee. In the midst of the current sustainability fanfare, two firms come to mind: M&S with its Plan A agenda and Unilever with its Sustainable Living Plan.

In this issue of *Impact*, Unilever CMCO Keith Weed's comments illustrate the depth of the

FMCG giant's strategy. No longer siloed in a CSR department, sustainability is now integrated into every aspect of the business.

There is an intelligence and thoroughness to its sustainable business agenda that is lacking in so many other corporations. Setting a goal to double the size of the business, while reducing its environmental footprint, is ambitious and, inevitably, difficult.

When reporting on their sustainability progress, both Unilever and M&S have had to be honest – or transparent in today's parlance – about the difficulties involved in meeting the challenges they have set themselves. This sometimes means missing targets.

Most recently, Unilever has announced a long-term partnership with the Department for International Development (DFID) to improve the health and economic prospects of people in the developing world. Its aim is to create jobs, improve water and sanitation and establish sustainable supply chains. It is the first of its kind between a business and the DFID.

Changing people's lives, in genuinely empowering ways, is sustainability at its very best.



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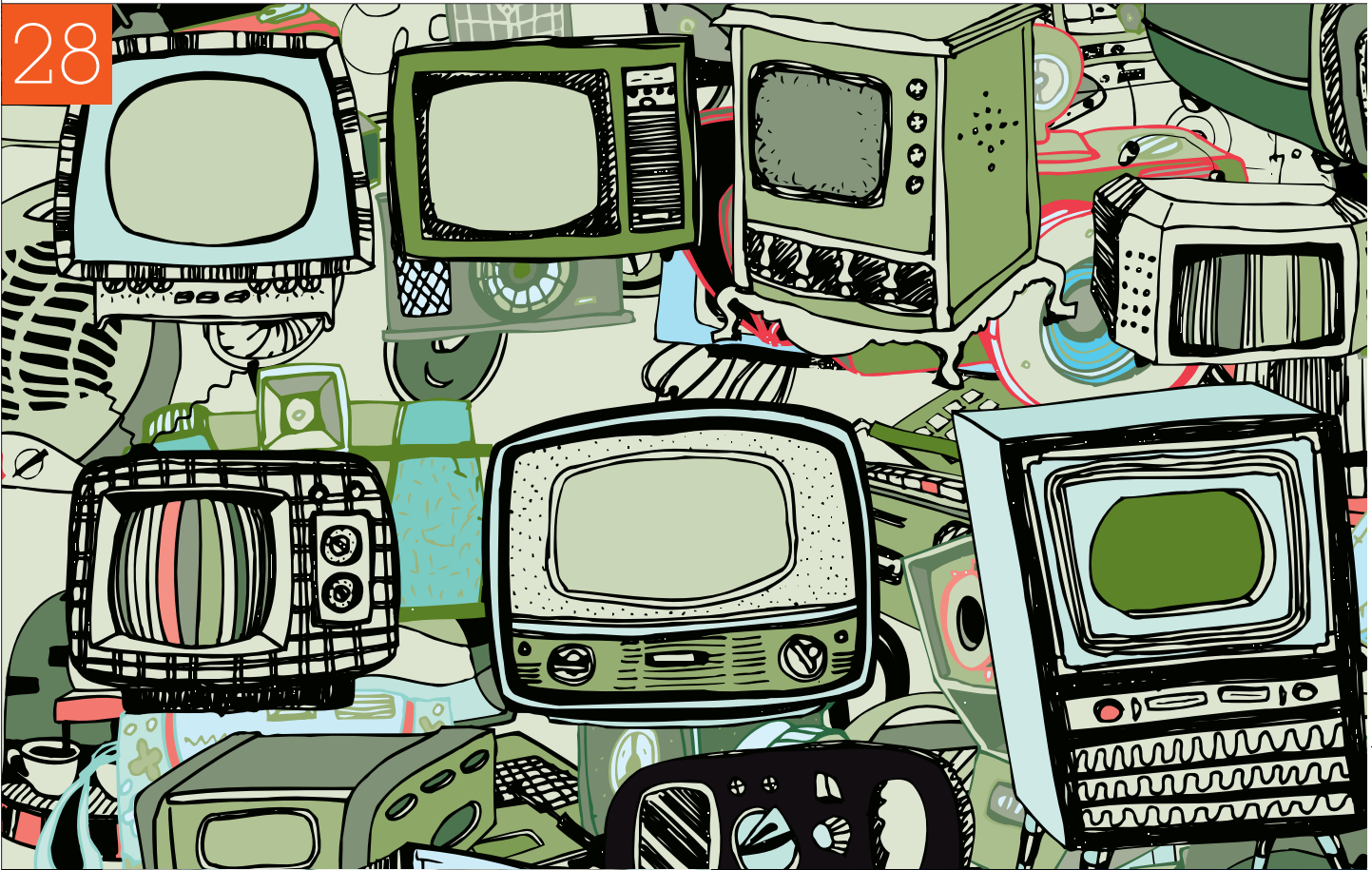
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Customer focused...
Keith Weed



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Artistic excellence

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Morgan is a former researcher and deputy editor of *Impact*. She investigated the changing pattern of TV consumption in our report on p28.

Jane Simms



Simms, former editor of *Financial Director*, interviewed Unilever's chief marketing and customer officer Keith Weed for our profile on p22.

Lucy Fisher



Fisher is a freelance writer specialising in marketing. For this issue, she met Mick Doran, head of strategic insights at Heineken p38.

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Kevin Reed

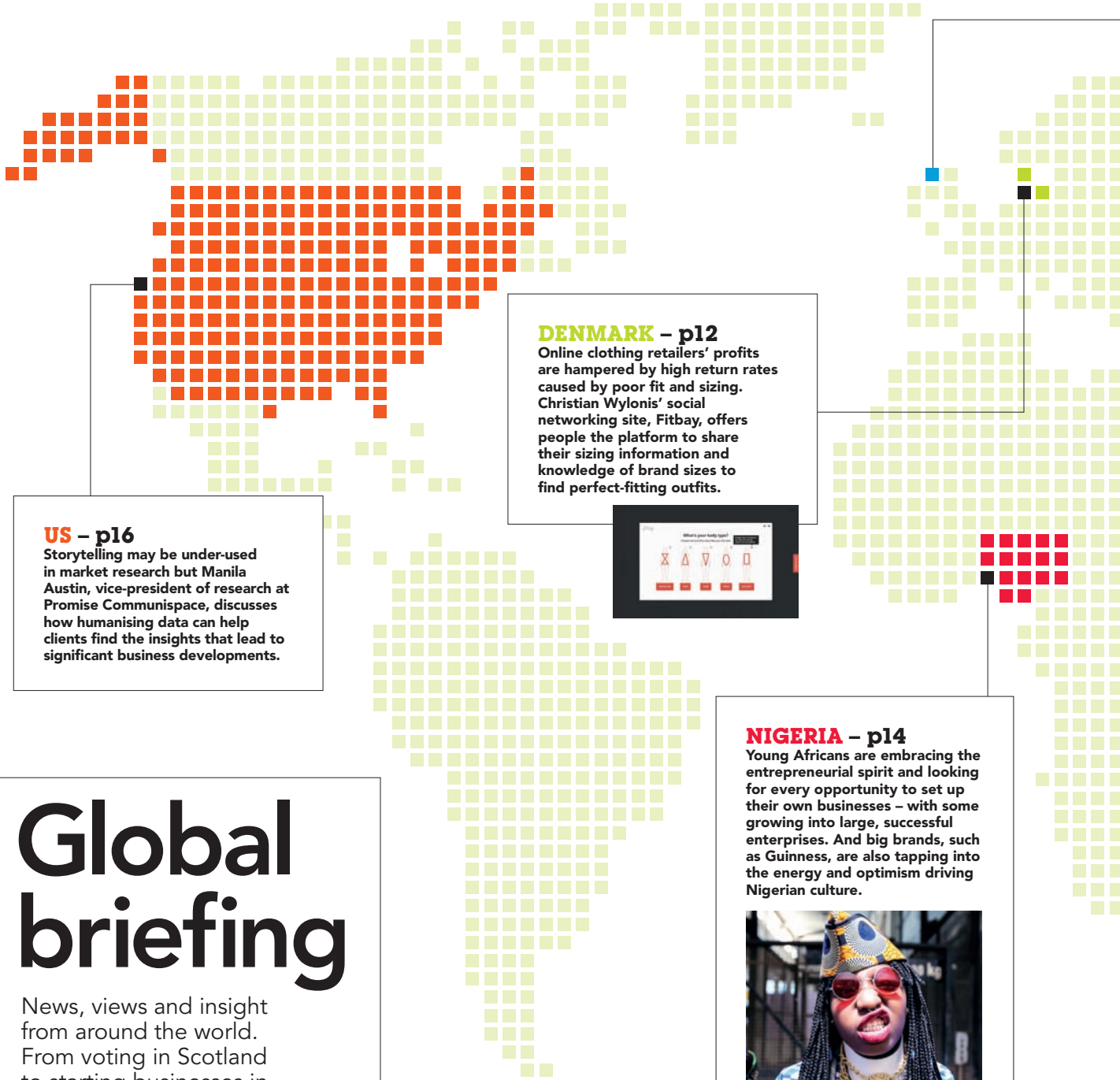


Reed has been art director for *Impact* since its launch. He devised the concept for this edition's front cover and special report illustration.

IMPACT

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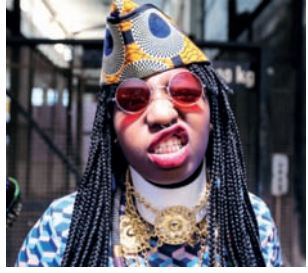


US – p16
 Storytelling may be under-used in market research but Manila Austin, vice-president of research at Promise Communispace, discusses how humanising data can help clients find the insights that lead to significant business developments.

DENMARK – p12
 Online clothing retailers' profits are hampered by high return rates caused by poor fit and sizing. Christian Wylonis' social networking site, Fitbay, offers people the platform to share their sizing information and knowledge of brand sizes to find perfect-fitting outfits.



NIGERIA – p14
 Young Africans are embracing the entrepreneurial spirit and looking for every opportunity to set up their own businesses – with some growing into large, successful enterprises. And big brands, such as Guinness, are also tapping into the energy and optimism driving Nigerian culture.



Global briefing

News, views and insight from around the world. From voting in Scotland to starting businesses in Nigeria. Compiled by **Jane Bainbridge**

SCOTLAND – p8

Citizens, north and south of the border, have been on tenterhooks for months awaiting the outcome of the Scottish referendum. Pollsters have had their work cut out to forecast voting intentions accurately, especially as the 'Yes' vote gained ground in the final weeks. Gregor Jackson, research director at ICM, analyses the performance of the polling agencies.



JAPAN – p10

Direct access to local sample, cultural knowledge and market expertise is leading to growth in the supply side of the Japanese and South-Asian market research industry, as Cint Japan's sales director, Soji Nagano, explains.





Sponsor



SCOTLAND



No!

The Scottish independence referendum showed the polling agencies got it right on the night – just, says **Gregor Jackson**, research director, ICM

Writing this on the morning after the referendum, there's no question that polling has been at the heart of the debate in the run-up to this crucial vote. We all said it would be fairly close and so it proved. While the 10 percentage point triumph for the Better Together campaign (55%-45%) was more comfortable than the eve-of-referendum polls suggested (showing an average four-point 'no' lead), the pollsters correctly predicted a much narrower victory than had been the case two months before. The final pre-election polls converged around the 52%-48% mark, so the results were within the three percentage point margin of error.

In this sense, I feel we polling agencies can be reasonably pleased with our performance, but the momentum behind Yes Scotland after the second televised debate certainly put the cat among the pigeons. After a string of mostly double digit 'no' leads, a poll from YouGov in early September had the nationalists in a two-point lead for the first time, which sent shock waves through Westminster and the business community. Given the known margins of error, the market research sector was left wondering nervously whether they had called the right result –

the memory of the 1992 General Election still looms large.

Without a doubt, the independence vote raised a number of challenges for pollsters, the ramifications of which will continue to be felt throughout the industry.

For a start, the referendum exposed the difficulties of conducting online polling – the method used by most agencies – north of the border. While there are more than 4m adults living in Scotland, few are members of online panels, which resulted in an over-reliance on a small group of respondents.

Another hot topic was the unknown factor underpinning the referendum. Most firms, when conducting election voting intention polls, weight the data to past votes to ensure a politically balanced sample. However, as this was the first referendum of its kind, agencies were left with a choice of the 2011 Scottish Parliament election or 2010 UK General Election. Which approach to adopt was the subject of much debate between the agencies, and contributed to some significant divergences in reported voting intention early in the campaign. Particular attention was focused on the different SNP vote shares at each election, and its potential impact on the 'yes' vote.

Indeed, at the back of many pollsters' minds was the existence of the 'shy no voter', the belief that some unionists concealed their opinion from researchers for fear of being seen as unpatriotic. Evidence suggests this did contribute to the understating of the 'no' vote in pre-election polls.

The referendum was also the first time 16 and 17-year-olds were entitled to vote in a UK election, which presented another hurdle, given the difficulty of reaching young people, even by digital methods.

Undoubtedly, the dominant story from the campaign was the narrowing of the polls in



the final weeks of the campaign. Commentators drew comparisons with Quebec's attempt to leave Canada in 1995, when the independence vote received a surge of support in the final weeks and lost by a single point. The surge in Scots nationalist fervour was mostly driven by a sharp increase in support for independence among Labour and working-class voters whose support became vital to both campaigns. Only the over-60s could be regarded as a safe bet by the Better Together team.

For many analysts, the turning point was the second televised debate between the two leaders in which a snap ICM survey showed Alex Salmond to have outperformed Alistair Darling. Crucially, however, the debate did not influence how people said they would vote in the referendum with the yes-no percentage, among those watching, identical both pre- and post-debate.

Overall, it was a keenly contested referendum campaign with much to reflect on. Despite it being described as a once-in-a-generation vote, few would bet against a rerun in the next five to 10 years.

JAPAN

Sea of change

Accessing good quality panels in South East Asia is a challenge. Partnerships could be one solution, says **Soji Nagano**, sales director for Cint Japan

bringing some of the controls and know-how for online sample and panel sourcing in-house.

One contributing factor has been the ongoing challenge of accessing good quality panels, specifically in the South East Asia region. In countries such as Thailand, for example, no genuine local provider has these, as there are challenges in building commercially viable and sustainable panel assets, including low internet penetration, gaps in demographics of the population being online, and cost and ease of recruitment. In addition, local market knowledge is required to best-engage participants – on what drives response rate and what kinds of incentives might work – and that local insight doesn't seem to be available.

These new buying priorities mean those with the right technology and strategic partnerships to bring resources and solutions together, in collaboration with local partners, have benefited from this market evolution. The need for direct access to local sample, cultural knowledge and general in-market expertise is encouraging growth in the supply side of the MR industry in Japan and South-East Asia.

Working closely with organisations that may already own audiences and have access to large web traffic, such as publishers or local or regional brands, is one way of solving sample access problems.

At Cint we're working to develop this area as

our platform allows access to samples and creates revenue and insights. It means the publisher, or local brand, can combine their customer-behaviour data with our profiling information to create a fuller picture to engage potential advertisers.

This sea of change in Japan has been further propelled by the desire of the country to learn more about the perception of Japan in the outside world, fuelled by Olympics 2020 – known as the Games of the XXXII Olympiad and colloquially as the Tokyo Olympics. Winning this bid has invigorated the country and provided the drive needed to gain insight on perceptions of Japan. There is heavy investment now in inbound tourism to gather insights; the government is ploughing funds into research, and this is further strengthening the MR industry.

It is indeed an exciting time for us as a country and culture, with such a major event ahead of us, and at a time when the economy is also showing signs of a slow – but steady – recovery.

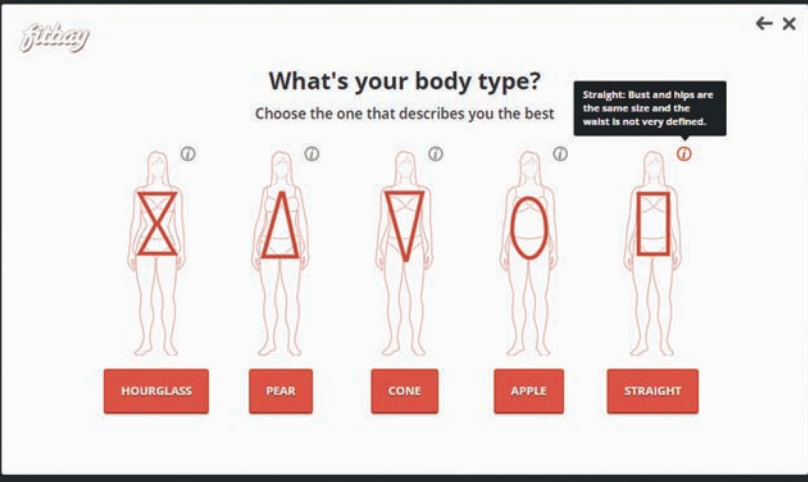
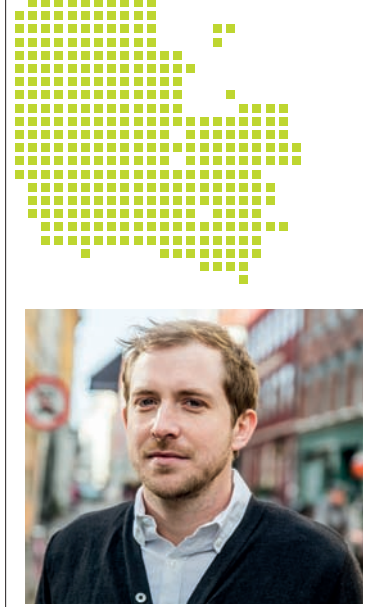
Japanese market research has seen a significant shift over the past few years in terms of how buyers and suppliers are behaving and collaborating with each other.

The way in which MR companies in Japan are conducting international online studies has changed, as cost effectiveness, sourcing and operational efficiencies are emphasised. Quality is still important, of course – the Japanese market has long been a leader in demanding and delivering high-quality data collection – but today, many have gone from outsourcing the entire fieldwork function to

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DENMARK



Perfect fit

Fitbay is a social networking site based around sharing information on body shapes. Its founder, **Christian Wylonis** tells *Jane Bainbridge* how the data it collects can take the pain out of finding the perfect fitting outfit

Like so many new business propositions, the kernel of the idea for Fitbay came from a personal need.

Christian Wylonis is 188cm tall and about 95kg; by his own admission this is not particularly tall for a Dane, but he has a long back. As a consequence, finding shirts, T-shirts and jackets that fit him well has been a struggle.

Combine that personal conundrum with the business acumen acquired in his ecommerce consulting role for McKinsey and you have the makings of a start-up. And it was at McKinsey that he first encountered the issue of returns for online shopping. "Between 30 and 40% of clothes sold online are returned, largely because of size and fit issues. That got the mental juices going," he explains.

"The more I looked, the more I realised what a problem it was. It's a problem for men but even more so for women, as they probably vary in shape and size more than men. If you are a pear-shaped woman, then there are certain clothes that are appropriate for you, but not for someone hourglass-shaped," he says.

So, in the summer of 2012, Wylonis quit his job to pursue his business idea and after beta testing and seed funding, in February this year, Fitbay was officially launched.

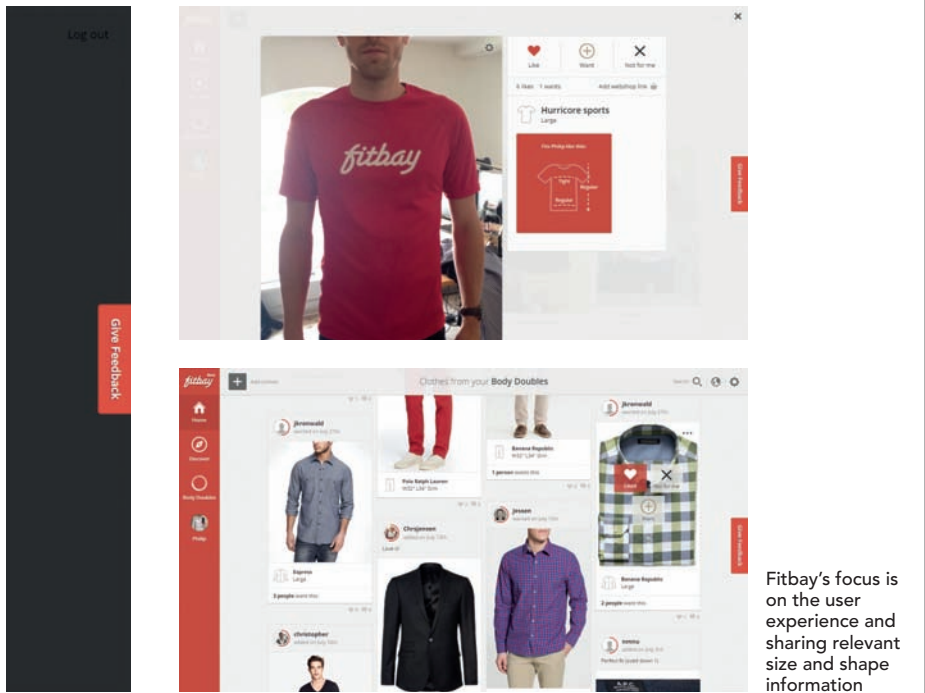
The network is based on the premise that by

sharing information on your body shape (height, arm length, body shape, and so on) and experiences you have with clothes sizes from different brands, a database of sizing information can be created. It connects you with your online body doubles so you can swap reviews of brands and styles that suit your size and shape.

And it's not just body shape that makes finding the right fit such a lottery; sizing has always varied from brand to brand but, with the rise of vanity sizing – where brands tend to make their sizes larger than they really are to make people feel good about themselves – it has become an even bigger problem.

Interestingly, for a site all about helping find clothes that fit, users don't upload any measurements.

"The first problem is most people don't want to enter measurements; the second is that if you gain 4lbs then you have to measure all over again and people won't do it. Having these measurements doesn't help. Virtual fitting rooms try to compare



Fitbay's focus is on the user experience and sharing relevant size and shape information

body measurements to the measurement of clothes but most brands don't have that information and, if they do, it's often inaccurate," says Wylonis.

"We can predict size more accurately based on body information and comparing with the size on brands," he says.

Since its global launch earlier this year, Fitbay has grown rapidly and now has a wealth of data accumulated on its 100,000-plus users. It has more than 4m products, from the high street to designer boutiques. Wylonis says its users are – unsurprisingly – mostly the younger, tech-savvy generation and specifically 18 to 30-year-old women and 22 to 35-year-old men.

"We have hundreds of thousands of data points of real people telling us which products fit them and in what size; there are lots of insights we can draw out of that data. We can say a certain brand is popular with tall, skinny and short, regular people but not popular with short, curvy ones. This could be very interesting

for brands from a body perspective. Brands think about [customers in terms of] age but less so from a body shape perspective," he says.

"We also have a lot of information about size preferences – if you told me your height, weight and body type and the brand you are considering buying, I could tell you that the most popular size is medium for people similar to you. That would be valuable information for you that we only use on Fitbay, but we could use elsewhere."

While the company's focus is on the user experience rather than about dealing direct with the brands, the business model is based on reaching a critical mass where it can generate revenue from retailers for its lead generation.

With a base in the US as well as Denmark, Fitbay continues to grow and – with mobile the key platform – its next step is to add an Android version of its app, due out in a couple of months.

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NIGERIA

Do it for yourself

For young Nigerians, entrepreneurialism is flourishing as a new generation forges its own path, and brands are recognising this, writes *Jane Bainbridge*

In Africa as a whole – and Nigeria in particular – entrepreneurialism is taking hold as young men and women make their own way in the world.

There are a number of factors that have led to this mindset becoming more prevalent in society. With no welfare system to fall back on in times of hardship, there is a strong sense of having to make it on one's own. This, combined with a period of political and economic stability, in a nation consisting of positive young people, has all meant an entrepreneurial spirit is thriving in Nigeria.

Big brands are tapping into this; most recently seen with Guinness' Made of Black ad campaign created by AMV BBDO in London, celebrating the colour of the stout and the colour of the nation in a high-energy, two-minute ad starring African artists and performers.

Greg Wells, a director at Flamingo, has worked in Nigeria and has been involved in the research agency setting up a new interactive website – MINT Project – looking at the emerging cultural shifts taking place in the MINT countries (Mexico, Indonesia, Nigeria and Turkey). He says: "The Guinness campaign is set in creativity; that desire to express who you are and set your own goals and path and make things happen. If you think about where Africa has come from – and the lack of voice and opportunity – that campaign is the exact opposite. It's a celebration of what young people do."



Guinness' Made of Black campaign celebrated the energy of the region



Wells points to other big brands building their presence and marketing in Nigeria, often around supporting the more local, entrepreneurial elements. He cites Samsung, BlackBerry and LG in the tech sector and, in social media, Facebook. In September, half of Africa's 200 million internet users were using Facebook on a monthly basis, according to the social network, the vast majority (more than 80%) via mobile devices.

But, on a consumer behaviour level, what is it that has caused this entrepreneurial spirit and attracted the attention of the big brands?

"It's quite a hierarchical culture where opportunities haven't been afforded – people are seeing them now and going out and getting stuck in. They make decisions as individuals almost as if they are mini businesses, as opposed to the middle class here, which thinks

about contentedness – 'I've got a house and car and I'm happy with my lot' – over there, they're looking for a return on investment on every purchase, every meeting. 'How will this help my future?' They're always looking to move forward.

"On a cultural level, people are super-positive; there's a real belief and faith in going out there and doing things and that you can make a success for yourself. It often goes in tandem with a faith in God; it's a religious country and there's been a rise of the Pentecostal church. If you believe you can do it, then you will. If you're deserving to be rich, you will be rich. That's why there's so much entrepreneurialism," adds Wells.

However, he says there are still regional differences in Nigeria. "There are massive political troubles in the north while, in the east, you have more of the delta and oil



Nigerian facts

120 million mobile subscribers

24% of the population has internet connection (predicted to rise to 40% by 2020)

44% of the labour force are women

150 ethnic groups

7th most populous country in the world

Source: Flamingo

regions – they struggle with their own issues. There are 200m people in the country, as best they can predict, and the majority are in the south west, so Lagos and that region is the driving heart of the country.”

Nigerians’ entrepreneurial spirit manifests itself in people doing multiple things: they may be employed during the day while doing an evening class to learn a language or other new skills; they may also run an import/export business on the side.

And some are building substantial businesses in the process. Jason Njoku set up iROKOTv, a digital movie- and TV-streaming website. It has become the world’s largest distributor of Nigerian movies and is often referred to as the ‘Netflix of Africa’. Njoku describes himself as “a modern-day capitalist”.

Meanwhile, Sim Shagaya founded www.konga.com which has become Nigeria’s biggest e-commerce site selling everything from mobile phones to books, and from wine to generators.

This may just be the beginning of a wealth of self-starter businesses that will grow out of this nation.



US

Humanising data

Facts and figures are not the only thing influencing business decisions. **Manila Austin**, vice-president of research at Promise Communispace, says agencies need to provoke and inspire clients to take action

Over the past year, I have engaged with more than 50 clients globally, uncovering strategies for transforming consumer insights into business impact. My interviewees suggest that the most effective insight professionals spend as much time synthesising information and marketing insights as they do collecting data. They make clear and cogent recommendations to the business and are comfortable with using ‘good enough’ information to inform specific decisions.

Underlying all of these strategies is the fundamental need to humanise data. As one client explained, “The provocative conversation is the key to engagement with stakeholders,” and it is the human experience, expressed qualitatively, that “has the power to get people to think differently”.

Tell better stories

Despite its obvious importance, storytelling remains an under-developed skill in market research. It’s not enough to present data in an accessible and business-relevant manner: every good insight story needs to forge an emotional connection with the audience. You can bring the human side of data to life in many ways – through quotes, images, audio and video. Providing human texture is particularly powerful at strategic junctures, when you expect people to question a finding, when an insight conflicts with established perspectives, or when conveying the severity of an issue or opportunity. Whatever your choice, making the human context real is the key to eliciting an emotional response and inspiring action.

I recommend presenting stories in person, or better still, actively engaging your business partners. Here are three recent examples to get you thinking:

Immerse people to help them directly experience – and empathise with – the consumer’s reality. A US-based hospitality client was making a major investment to expand into China. The brand needed to resonate with Chinese parents travelling with children. To make Western executives fully appreciate how scheduled children’s lives are – nearly every hour of the day – and how that affects parents emotionally, our team took creative measures to immerse executives in Chinese parents’ reality. This included: a ‘clothesline’ of community member pictures and facts; time capsule letters parents had written to their children; and visual diaries of children’s daily activities to bring to life how little free time children have for play.

Integrate consumers into the development process to shorten time-to-market. A health and beauty client wanted to introduce a sub-line brand extension that offered unique fragrance options. We used digital ethnography to explore the emotionally evocative qualities of scent, inviting online community members to upload video, pictures and stories about intriguing scents they encountered over the course of the day. The quality and abundance of rich data allowed the client to generate and filter a multitude of ideas for new scents and fragrances. They completed the concept development



stage in one-third of the time. The result? The launch sales of the new fragrance line exceeded forecasts.

Bring executives, business partners and consumers together in live workshops to co-create the future. One of the world’s leading fast-moving consumer goods companies wanted to explore the future of oral care products and merchandising at various retail stores. First, brand decision-makers and consumers participated in workshops, co-creating retailing ideas. Then, the brand held sessions with retailers to inspire new ideas for future shopping experiences.

If insight professionals want to create impact, they must embrace the emerging truth: human context – and the empathic response it evokes – has more power to influence and inspire action than any data point ever could. ■

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It's a connected world

How mobile gaming could cure cancer

The scientific world has harnessed mobile gaming to encourage everyday citizens to examine large data sets.

"Let's move from extracting data to extracting human energy," said Tom Rowley (pictured right), partner at Stripe Partners, and co-founder of collaborative community Good for Nothing. Alongside Amy Carton (pictured right), programme manager and 'citizen science' advocate, he presented his experience of how people can be encouraged to use their free time for social good.

According to Rowley (and *The Economist*), the amount of time people around the world have spent watching Psy's *Gangnam Style* to date is equal to the time it would take to build 20 Empire State Buildings or 4.5 Stonehenges. Quoting American economic consultant Clay Shirky, Rowley explained that the world "has over a trillion hours of free time to commit to shared projects". So how can people be encouraged to use this time for good?

Rowley outlined his key ingredients for engagement: a big, transparent mission; clear and passionate leadership; opportunities for recognition; scope for learning; and a framework for doing things. 'Wiknics' (Wikipedia picnics), 'clicktivism' site Avaaz, and the two hackathons per week that take place in London alone are all projects that meet these criteria. According to Carton, there are also other collaborative projects involving everyday people that fit this bill.



JANE BAINBRIDGE AND BRONWEN MORGAN
REPORT ON THE MARKET RESEARCH SOCIETY'S CONNECTED WORLD CONFERENCE, WHERE EVERYTHING FROM MONETISING THE INTERNET OF THINGS TO THE PSYCHOLOGY OF SOCIAL MEDIA WAS DISCUSSED AND DEBATED



Carton explained that Charles Darwin received many letters from scientists around the world that helped to inform his work on evolution. But, she added, he also received letters from housewives, outlining things they had observed. These, too, contributed to Darwin's work, and represent one of the first examples of 'citizen science'.

A modern example is Carton's work with Cancer Research UK. Research data was released to the public on Cell Slider, allowing non-scientists to analyse it in image form. Not only did they closely match pathologists in their ability to identify cancer cells and oestrogen receptor status, they also did it six times faster. Meanwhile, Google, Amazon and Facebook collaborated to produce a mobile video-game app – Play to cure: Genes in Space – through which citizen scientists mapped 40 miles of DNA data in one month, and the entire dataset in three months.

"You must be authentic," said Carton, on how to engage people in collaborative tasks.

81%
of people in the UK have considered no longer using a product or service because of how it uses their data*



Connecting through sensation

The internet is based around audio and visual interactions, but may soon extend to all five senses, said Professor Adrian David Cheok (pictured above).

A specialist in pervasive computing at City University, and the founder of the Mixed Reality Lab, in Singapore, Cheok described how more than half of all communication is non-verbal. This, he said, illustrates the importance of moving “from information communication to experience communication”.

Touch, said Cheok, is one of the most basic of animal needs – as demonstrated by lab experiments in which baby rhesus monkeys showed a preference for a fake mother that doesn’t give milk, but is covered in fur, over a wire-mesh mother that does give milk. This field of knowledge has led to the development of products such as RingU – which can transmit a ‘squeeze’ over the internet – and Huggy Pajama, which can transmit a ‘hug’ via a jacket, wired up to a computer. “Once we digitise touch,” Cheok said, “we can have new touch relations.”

Smell and taste are the only senses directly connected to the area of the brain linked to emotion. For this reason, the digitisation of these senses is particularly compelling. The audience was given a demonstration of a mobile-phone attachment that transmits the smell of roses or whisky when prompted by a text message. An audience member also tested a sensor that, when placed on the tongue, can invoke a sour taste in the mouth.

If senses can be digitised, they can be recorded and stored. In theory, said Cheok, we will be able to record our favourite childhood smells, or the hug of a loved one – so it can still be experienced even after they have died.

54%

of 18- to 34-year-olds have already stopped using a product or service because of issues around data use*

Monetising data with the internet of things

The internet of things (IoT) could open up the direct monetisation of data between individuals and brands, according to Moeen Khawaja, partner of Umbrellium (pictured below).

Introducing his company’s IoT search engine, thingful, Khawaja pointed to forecasts that state there will be between 10 and 26 connected objects per person within the next 15 years.

This proliferation of connected devices opens up vast volumes of data; however, Khawaja warned, this data must be considered in context. For example, if someone is driving a connected car – and the data shows they brake suddenly – does that make them a bad driver, or show that they have avoided an accident?

Khawaja admitted that the potential for people to monetise their data directly with a brand was “a big leap of faith”. “The IoT makes it technologically possible, but whether people are willing to adopt it is yet to be seen,” he said.

At a time when the right to be forgotten has moved up the agenda – along with wider privacy issues around data collection – Khawaja acknowledged it was “messy” for market research. But he warned marketers they couldn’t ignore it – they had to understand it fully, and think strategically.

“The consumer needs the control to set everything to zero – where there is no data sharing,” said Khawaja. “While we don’t know what the marketplace will look like, provenance and interoperability will be essential.”

“Do not ignore this as hype; there is a lot of money being thrown at it because companies want to mine data in search of efficiencies; it’s happening, and the amount of data generated is going to dwarf what’s available today.

“Some of it is creepy, but we could flip it and help individuals take control back,” he said. ▶





Performative egos and online personas

The persona we project in our online social worlds is carefully considered, and vital to our sense of self-recognition, argued psychotherapist and academic Aaron Balick, (pictured above and below).

"We shouldn't think that way, but we do, because we are fundamentally relational," he said.

Balick referred to psychoanalyst Jessica Benjamin's definition of recognition being about a person's need to "affirm, validate, acknowledge, know, accept, understand, empathise, identify, find". So many of social media's actions – from shares to retweets, upvotes to comments – are motivated by this need for recognition.

"Online is a really great example of what egos are doing, and what they need," said Balick, explaining how social media appeals to the outward-facing aspect of the ego.

The consequence is that it casts a shadow. There is the seen – the idealised version of ourselves we project and promote – and the unseen – the more shameful side, our deficits, what we don't want people to see. Balick argued that the selfie – the online phenomenon of 2013 – may look spontaneous, but "this is paradox, as a lot of care goes into it".

"There is no single self; they are all presentations and aspects of the self. Egos are performative – outward facing and acting – and people are invested in their outward-facing identity online," he said.

80%
of people want more regulation around how brands interact with their data*



Cutting through the data noise

Exposing clients to the 'noise' of vast amounts of social media data can increase the demand for research expertise, said Jess Owens, of FACE (left in picture right), who was speaking as part of a panel discussion on how to cut through this 'noise'.

Owens described how finding value in the data relies on narrowing down broad topics to smaller questions, and analysing these qualitatively. It is vital, she said, to look to prove negative hypotheses – as well as to seek proof of whether learnings can be applied to other brands – in order to achieve intellectual rigour.

"If you come to the data with a story, you will find that story in the data," agreed fellow panellist Tom Ewing, of BrainJuicer (far right in picture). "That's the meaning you've brought to the noise."

Ewing argued that market research's desire to cut through data to find 'the story' can be a trap, because it can lead to finding the things you want to find, rather than studying what's there objectively.

But, argued third panellist Paul Edwards (seated third from left) – of Working Plural and JKR – it's almost impossible to approach the data in any other way. "You can't expect something to just pop out – you have to go in looking for things," he said. Although you do have to be willing to change your hypothesis in relation to what you observe, he qualified: "When you find that the information changes, you have to change your mind."

The value of social media data versus other market research data, said Edwards, is that you are not allowed to ask any questions. Instead, you're listening to what people want to talk about. But, Owens added, you can't use this type of research on its own; it has to be part of a larger suite of tools: "You're reliant on what people decide to say – you're not there for detail," she said. "It's not going to answer all your questions, but it is great for triangulating and filling in gaps. It can inspire further questions."

While it's vital to apply rigour to this process, Ewing argued, the desire that clients have to make things simple – and market research's innate "inferiority complex" – will impact on how these different tools are used.

"Like a tiny baby looking up at its mother, market research finds itself in relation to others," he said.



Edwards agreed that market research has a tendency to look at a question and define it as a 'qual' or 'quant' problem, rather than a market to be researched.

Alongside this is the extra problem of marketers believing that they can do the research themselves. One of the roles of researchers, therefore, is to focus clients on the worth of paying for an expert, said Edwards. "People are looking for context, and the ability to express an interesting truth in an interesting way," said Ewing.

The appeal of researchers is that they are a pair of "boots on the ground" that – in the realm of social media, for example – can lend context to how insights from different platforms should be interpreted, according to the nature of those

platforms. This, said Owens, is where researchers come in as tour guides, to help their clients navigate this data.

In relation to the question of whether we are poised to enter an even 'noisier' world, Owens believed we have probably got as many levels of data as we're going to get. So there may not be any further value in researchers coming up with fancy new methods to investigate the vast amounts of data out there.

"We need to rediscover idleness," said Ewing. "The fear of missing out is the animating principle of the modern age.

"The future lies in being more candid about the information you actually need and use, and leaving some of the shinier things on the shelf."

David Schneider's Twitter tips – information, insight, humour

- Be human, keep it short (ideally 100 characters)
- Use images
- Avoid the tendency to just talk about your sector
- Embrace serendipity
- Engage with your audience
- Who's the influencer in your sector? Who do you want to follow? Then seduce them
- Originality – think of things that work for you, and what will make you different
- Reactive listening is the most powerful tool for provoking engagement ■



*Source: Alex Jenkins, editor *Contagious*

A man with purpose

Unilever's chief marketing and communication officer, **Keith Weed**, is looking for continuous innovation in all aspects of marketing, and wants insight to lead the way. By *Jane Simms*

If you're having Keith Weed round for dinner, be careful what you leave in your bathroom cabinet. "The first thing I do when I visit anyone's house is go to the bathroom, lock the door, and have a good dig around in the cupboards," he admits. "I'm fascinated by what's in the back, gathering dust, and what's at the front, being used."

This kind of curiosity about people's lives and habits is an essential attribute of all good marketers and researchers, believes Weed, chief marketing and communication officer (CMCO) of Unilever, the world's second-biggest advertiser. Indeed, he thinks some marketing has become too remote from the people it's meant to be reaching, and – in a similar vein to Unilever's long-running Dove Campaign for Real Beauty – he's on a bit of a campaign of his own, for 'marketing to real people'.

People are human beings, not consumers, he insists. "They're not a pair of armpits in search of a deodorant, or a head of hair in search of shampoo. You can't compartmentalise their lives. They are real people and we need to understand them in the round – what they do and why, and the role brands play, and could play, in their lives."

Tailored markets

Weed wants Unilever's brands to play a bigger role in people's lives, and is spearheading a drive to grow the number of €1bn brands, such as Dove, Flora, Magnum and Surf. But size and scale aren't everything: big global brands will also be tailored to local markets, and have real depth. ▶





CV

KEITH WEED

Education: University of Liverpool, BEng First class (Hons).

1979: Begins career at Michelin.

1983: Joins Unilever, working first in Elida Gibbs UK, before moving to senior positions in France, the US, and a variety of global and regional management and marketing roles.

2001: Becomes executive chairman Unilever HPC (formerly Lever Fabergé).

2005: Takes the position of head of global homecare and hygiene (laundry, household care, oral care and drinking water).

2010: Becomes chief marketing officer and communication officer of the Unilever Group. He also leads Unilever's sustainability work, and the Unilever brand.

▶ The strategy for achieving this ambition is called Crafting Brands for Life, which aims to build brands – based on deep consumer insight – that resonate with, and engage, people beyond the functional and emotional level.

“Brands can become real solutions for our broader lives,” says Weed, citing – as an example – the Persil/Omo Dirt is Good campaign, which runs advice and research programmes to encourage active development and outdoor play.

“The fact that ‘Persil washes whiter’ is no longer enough,” he adds. “It’s like going to the same parties and having the same person tell you exactly the same jokes, time and time again. You just want to walk away. Similarly with brands: you need to give people something deeper to get them to engage, and people are interested in things like child development, learning and getting dirty through play.”

Purposeful message

The strategy seems to be working. The market shares of brands such as Dove, Persil and Ben & Jerry’s are growing, Weed says: “These are big brands with clear, purposeful messages, and they engage beyond the superficial. David Jones [former CEO of communications company Havas] said recently that we need to move from ‘marketing to consumers’ to ‘mattering to people’, and he’s absolutely right.”

Weed has marketed and run various parts of the Unilever business over the past 30 years, but – as CMCO – he has spent much of the past four and a half years steadily building ‘purpose’ into both the Unilever brand and the individual product brands. Part of that purpose is sustainability – and leading the company’s environmental and social work falls within Weed’s remit.

“One of the first things I did when I took the CMCO job was to cancel the corporate social responsibility (CSR) department,” he says. “Everything they did, we now embed into our brands, helping to give them purpose and depth. At the same time, it avoids the dilemma that companies struggle with of having marketing in one corner, selling as much as it can, communications in another, showing pictures of products helping starving children, and sustainability in another, trying to save the planet – all working in isolation, rather than together. I have pulled it all together into a new business model. We can respond to consumers’ lives with brands that are relevant



and resonant, and that have sustainability at their core.”

Weed is also the driving force behind Unilever’s Sustainable Living Plan, launched at the end of 2010 by CEO Paul Polman. The company aims to halve its environmental impact, sustainably source all of its agricultural raw materials, and improve the health and wellbeing of more than one billion people.

Research has shown that about two-thirds of Unilever’s environmental footprint comes from how consumers use and dispose of its products, so, last November, the company launched its biggest consumer-facing brand campaign – Project Sunlight. This promotes the sustainability message in all of its global markets, to encourage behaviour change, and consumer engagement with Unilever and its brands.

Weed appears genuinely passionate about sustainability. “Industry can be part of the solution,” he says, explaining that a new campaign for Lifebuoy in developing markets highlights how washing your hands with soap can stop infectious diseases from spreading.

“When people say: ‘What’s the business case for sustainability?’, I say: ‘Show me a business case for the alternative’,” Weed says.

Sustainability is one of four major trends that Weed believes are changing the world. The other three are: the demographic and economic shift from the north and west of the globe to the south and east; the move from rural to urban living; and the change from linear to digital communications. These demand a new approach to business, strategy, branding and research. “Insight is moving toward foresight; we have to get to the future first,” he says.

“If research can help find innovative solutions to some of the big human, social and economic challenges we are facing, it will be of increasing value in strengthening the partnership between consumers and companies like ours.”

When it comes to qualitative research, however, it seems many researchers need to catch up with the present.

Big insights

“Qualitative research is not as good as it might be,” Weed says. “Consumer and market insights (CMI) is a combination of qualitative and quantitative research. You can’t ignore the numbers – and developments such as digital and ‘big data’ mean we have more numbers than ever before – but you have to balance that with the insights, subtleties and shades of grey that only qualitative research can give you. We need big insights as well as big data, and that’s what’s lacking.”

“You can’t ignore the numbers, and digital and ‘big data’ mean we have more than ever before – but we need big insights as well, and that’s what lacking”

Weed’s frustration with the quality of research led Unilever to establish a global programme of accreditation for qualitative

researchers, which was rolled out in the UK in 2012.

“We are a big buyer of qualitative research – we spend more than £50m on it annually, and use more than 400 agencies. However, although we kept asking for them, there were no benchmarks, and quality wasn’t improving – so we felt the only way to address the problem was to tackle it ourselves,” Weed explains.

KEITH WEED, BY HIS COLLEAGUES

“He is the champion of 21st-century marketing. He’s passionate about brands and consumer insight, and his job is to lead the thinking about brands and marketing in Unilever – and to forge relationships with key partners. His biggest contribution has been to get the company to understand today’s

consumers, and the new opportunities and challenges they present. He’s a big advocate for ‘inventing the future’.” Peter Dart, global team leader for Unilever at WPP

“When Keith took over the CMCO role, he was explicit about wanting to get Unilever back in the forefront of marketing, not

just by embracing new technology, but by driving it. He hasn’t simply got to know Google, Facebook, Apple and so on; he has earned their respect, and influences what they are doing. He hasn’t just recognised the importance of mobile; he has invested in one the world’s leading businesses, Brandtone, and forced it to up the pace of

innovation and global reach. He has made Unilever the go-to business for any aspiring marketing tech start-up, because they know he is driving an appetite to experiment throughout his marketing community.” Mark Sherrington, principal of MTEK Ventures, and a non-executive director of Brandtone

► There have been clear benefits, he says. "It has added value to our own research, and to the industry as a whole. Individuals are putting their accredited status on their CVs, and other clients want to share our list of accredited individuals. However, we don't want to be policing it, so we are now working with other clients and industry leaders to try to outsource it." The Market Research Society is among the industry leaders working with it.

So what role should research play in a more complex, digital world, where sustainability has to be built into everything you do?

Transformational actions

"It's not about producing straight insight any more," says Weed. "It's moving toward inspiration and provocation. We need more breakthroughs and transformational actions, so market research can't be passive; it has to help marketers. Researchers also need to understand people, rather than treating them purely as consumers of products."

CMI is part of Weed's remit at Unilever because he believes in the role of market research in building brands. While insight isn't infallible – "if it was, we'd all have 100% market share" – Weed won't be drawn on the research that informed Unilever's controversial Path to Growth strategy in the early 2000s, which involved a drastic rationalisation of its portfolio to focus on 'power brands'.

"Path to Growth was a step in the evolution of the Unilever portfolio, and we've learned from that experience that you do need a portfolio of brands – big and small, niche and scale players. One brand can't deliver everything in every market, and in our current globalisation drive we won't be ignoring the role of small brands."

Striking the correct balance between global and local marketing is a challenge for all brands, and there is no blueprint. Unilever uses a mixture of niche and local agencies to help determine and implement its strategy.

"It's horses for courses," says Weed, adding that just "thinking differently" can help to reconcile the global/local dichotomy. The kind of global brands that he envisages for Unilever are those that – with local tailoring – appeal to large numbers of like-minded people in different countries.

"It's about finding what different groups of people, in different countries, have in common," he says. "For example, adolescent boys in Mumbai have more in common with adolescent

boys in New York and Shanghai than they do with their own families. But you need to tailor your marketing to penetrate the culture and be relevant. We reconcile those global and local elements by having brand developers who work across markets, and brand builders who work in markets to focus on the nuances."

Global versus local isn't the only dichotomy modern marketers have to wrestle with. Another is science versus art – or, in Weed's parlance, logic versus magic. "We need more logic and more magic; it's not a play-off of one against the other," he says. "But what I'm trying to do at Unilever is encourage more creativity and risk-taking, which involves a shift of mindset."

Weed believes that many marketers have lost sight of the fundamentals of good marketing – that is, an unerring focus on consumers and brands – and thinks developments such as 'digital' and 'big data' are partly to blame, because people see them as ends in themselves, rather than marketing tools.

Yet he is a huge fan of digital marketing – provided it is intelligently executed. "The digital

revolution allows the kind of direct connection with consumers that only retailers have had in the past, and it allows creativity and effectiveness at the

same time," says Weed, pointing to the success of Unilever's hairstyling videos, *All Things Hair*, on its YouTube channel as an example.

Cool application

Unilever and Google track hair-related searches to predict hairstyling trends, and use 'vloggers' to produce videos that allow people to create the new styles – using Unilever products – in their own homes. "Something like that has real utility," says Weed. "It's a really cool application of big data to create big insight."

TV advertising remains the biggest and most powerful way to engage with people, and is likely to be so for the foreseeable future, predicts Weed. Yet he has led the company into the digital arena – literally, in some cases, with trips for the marketing team to Hollywood, to learn about content, and to Silicon Valley.

He also recently announced that Unilever is putting mobile at the heart of its emerging markets strategy, because of its high penetration in those markets, and the

“ Market research can't be passive; it has to help marketers. Researchers need to understand people, rather than treating them purely as consumers ”



Unilever's €1bn brands

Dove	Omo
Rexona	Surf
Lux	Axe/Lynx
Knorr	Rama/Blue Band
Hellmann's	Sunsilk
Flora/Becel	Wall's/
Lipton	Heartbrand
Magnum	ice-cream

opportunity mobile affords to personalise communication at scale. However, he is concerned about technology's potential to splinter brands because of companies' tendency to hire specialists dedicated to a wide range of different channels. Unless the industry orchestrates things so as to reinstate the brand as 'hero', brands will be fragmented, he fears.

Weed is a consummate ambassador for marketing within Unilever and the industry as a whole, but what has kept him loyal to the company? After all, the average turnover for marketing heads is a couple of years.

"I'm a believer in longevity," he says. "Had I moved on after running the laundry and household care business for two years, it would have been questionable whether I had turned it around. I did it for five years, and that division is really successful now.

"I had to re-establish the idea of consumer as king, product as hero, and rebuild the business from the ground up and the top down – and you can't do that in a short period of time. It was the same at Elida Gibbs, where I stayed for five years and oversaw the merger with Fabergé. You learn from putting things in place and driving them through."

Weed has put lots of things in place in his current role, but feels the biggest challenge to

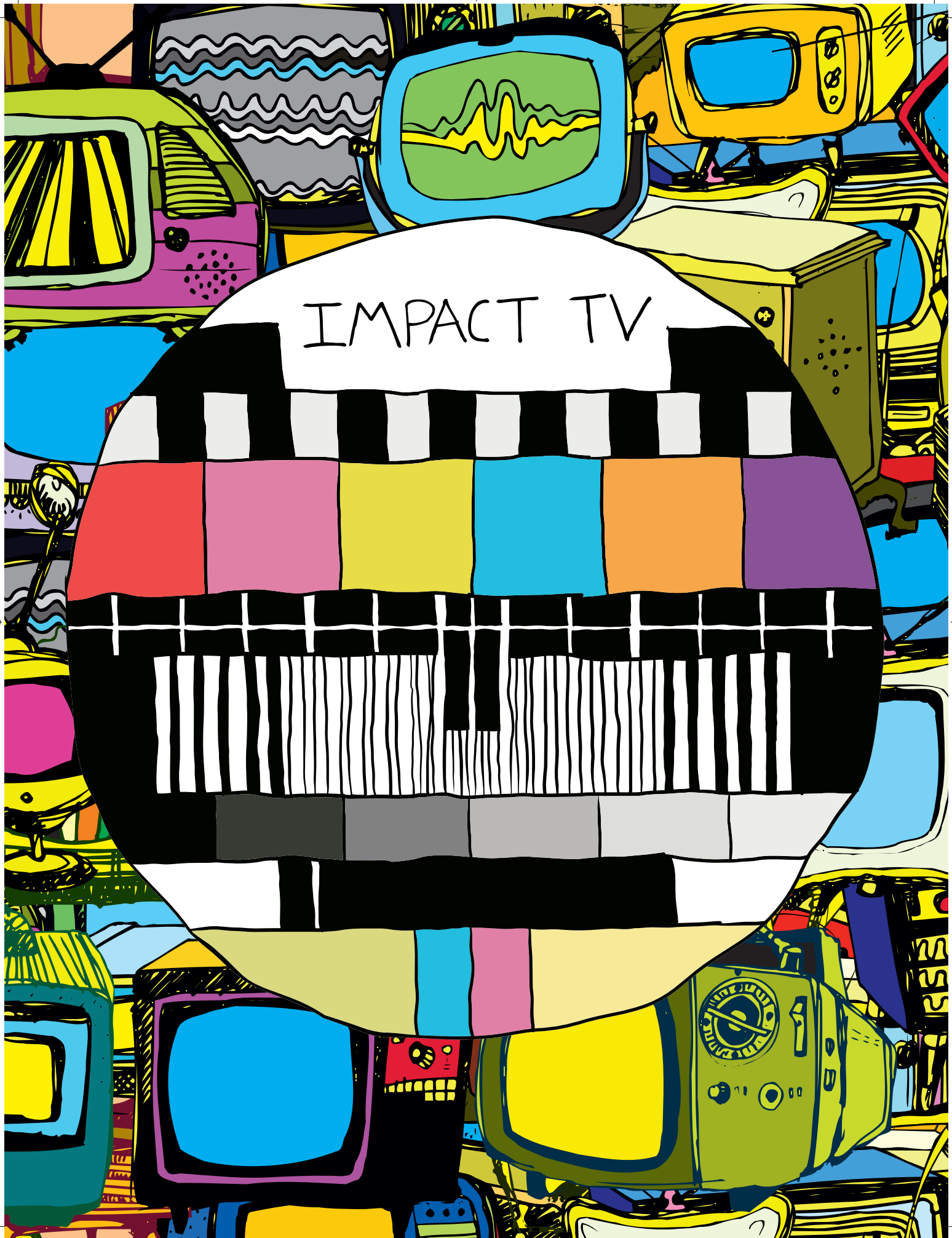
continuous innovation is attracting the best and brightest marketers in the face of mounting competition from big digital companies such as Google, Twitter and Facebook.

Awards and accolades

He and his fellow marketers at Unilever are certainly doing their bit. The company's reputation is second only to Google's when it comes to searches for 'marketing' on LinkedIn, Weed says, and is first when it comes to 'sustainability'. What's more, Unilever's haul of awards and accolades for marketing creativity and effectiveness is growing by the month.

"I strive for excellence, and am passionate about the best marketing – and to get that you need the best insights," he says. "Getting recognition for that attracts the best marketers and market researchers to work with us. In July last year, for example, Stan Sthanunathan joined us as senior vice-president consumer and market insights, from a similar role at Coca-Cola. I'm thrilled to have him as part of the team, and it gives us a real step up in CMI."

Life may be more challenging now, but it's infinitely more interesting, which makes it a very exciting time to be in marketing and consumer insight, Weed concludes. "We are going through a real revolution." ■



IMPACT TV



Divided attention

Now that TV content can be accessed from anywhere, at any time, audience measurement has had to evolve past its traditional head-count approach. **Bronwen Morgan** explores the changing patterns of TV consumption, and what this means for advertisers and researchers

Television audience measurement used to be about counting eyeballs in the world's living rooms. But with the rise of video on demand (VOD) and streaming services – as well as time-shifted viewing enabled by set-top boxes – audiences are now consuming content across multiple screens, and at multiple times. This means that the challenge of understanding who is watching what, where, when, and with whom – as well as what these connections are worth to advertisers – is becoming more complex. As media owners diversify to provide cross-platform viewing opportunities, media researchers must also break new ground in measuring what really matters to advertisers and media agencies.

Changing landscape

There are many statistics, from many sources, that inform the picture of television viewing in the UK today.

According to the Broadcasters' Audience Research Board (Barb) – which provides the industry standard audience measurement service – just less than 70% of UK households own a personal video recorder (PVR, see glossary).

Cumulatively, Barb says, the amount of 'catch-up' TV watched climbs as more people acquire PVRs. However, it's not necessarily increasing on a pro-rata basis: between January 2006 and August 2014, live TV fell from 98.8% of total viewing share to 89.9%, while

► time-shifted viewing rose from 1.2% to 10.1%.

“The concept of time-shifted viewing is not new for television,” says Justin Sampson, chief executive at Barb. “Before PVRs, you had the video recorder, which came out in the 70s, so the concept of being able to watch a programme at a time other than when it was scheduled is nothing new.”

The real transformation, says Sampson, has been the introduction of products such as Sky+ and Virgin On Demand (TiVo), which allow users to digitally record programmes and play them back whenever they want. When Sky launched its first PVR, around 12 years ago, many claimed that it heralded the death of linear TV, but Sampson claims this is far from the case.

“There has been a growth in the amount of time spent time-shifting – either recording what you want to watch, and watching it later, or going on to one of the on-demand services – but the pace of behavioural change is not as quick as some commentators would have you believe,” he says.

“I meet a lot of people who will say to me, ‘I never watch any live TV, it’s all pre-recorded or on demand’ – but the figures just don’t bear that out.”

Data from communications regulator Ofcom and the UK broadcasters show that VOD accounts for about 2.5% of total viewing. While this represents a small share compared with live TV, it’s important to note that 80 billion hours of live TV is watched per year – so 2.5% on top of that is still a significant amount of time spent watching VOD.

Nevertheless, the convenience of the medium does beg the question, why isn’t that share higher? “You assume on-demand TV offers you the purest form of entertainment that you could possibly want. It’s what you want, whenever you want it,” says Neil Mortensen, research

and planning director at Thinkbox, the marketing body for commercial TV in the UK. “So why doesn’t everyone do it all the time?”

Surprise results

The research team at Thinkbox explored this, with a study looking at which viewer needs were fulfilled by ‘on demand’ compared with other types of TV. To do this, they used a deprivation exercise: on-demand TV was taken away from participants for four days in a row, then given back to them. The study team then did the same with live TV: they took it away for four days and then gave it back. The results, says Mortensen, were surprising.

“They [viewers] felt they could completely and utterly live without live TV, because they didn’t think they watched any. They also thought they would be absolutely devastated if on-demand TV was taken away.”

“When live TV was taken away, participants felt fundamental needs they have as human beings were not satisfied”

What happened, says Mortensen, was that respondents were, indeed, upset about losing on-demand TV: they missed the choice and the accessibility it afforded them. However, when live TV was taken away from them, the participants felt that some of the fundamental needs they have as a human being were not being satisfied.

“Taking on-demand viewing away from people was like taking away their chocolate – a treat that they didn’t have all the time, but that they really enjoyed,” says Mortensen. “But taking away live TV was like taking away their food. People forgot that a lot of live TV acts like an electronic babysitter. All of a sudden,

mums were trying to fiddle around for on-demand content that fitted with what their kids wanted at that time, rather than just flipping on the telly.”

It is also widely accepted that certain genres of TV don’t translate well to on-demand viewing: sport, news, children’s TV and voting shows – such as *Britain’s Got Talent* and *The X Factor* – are much less commonly time-shifted than arts programmes, drama, documentaries and film. The people most likely to time-shift, according to Barb’s Sampson, are 25–34-year-olds, while the least likely are over-65s.

Skipping behaviour

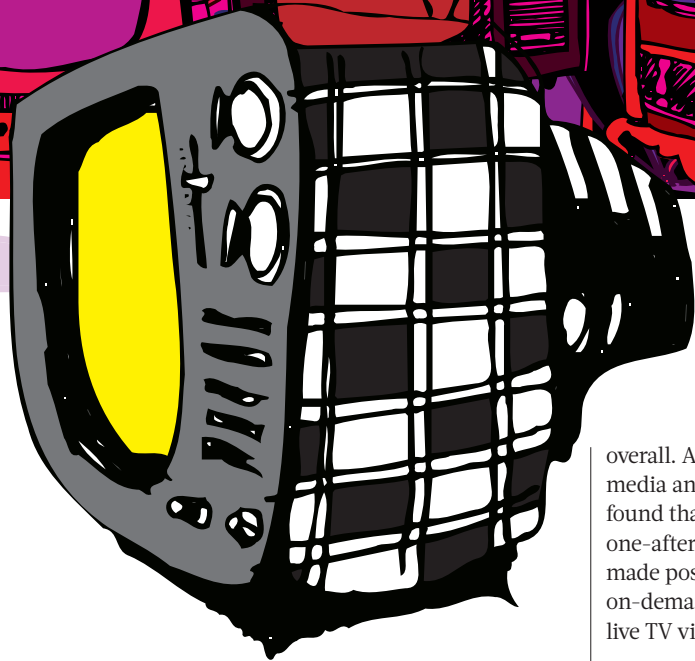
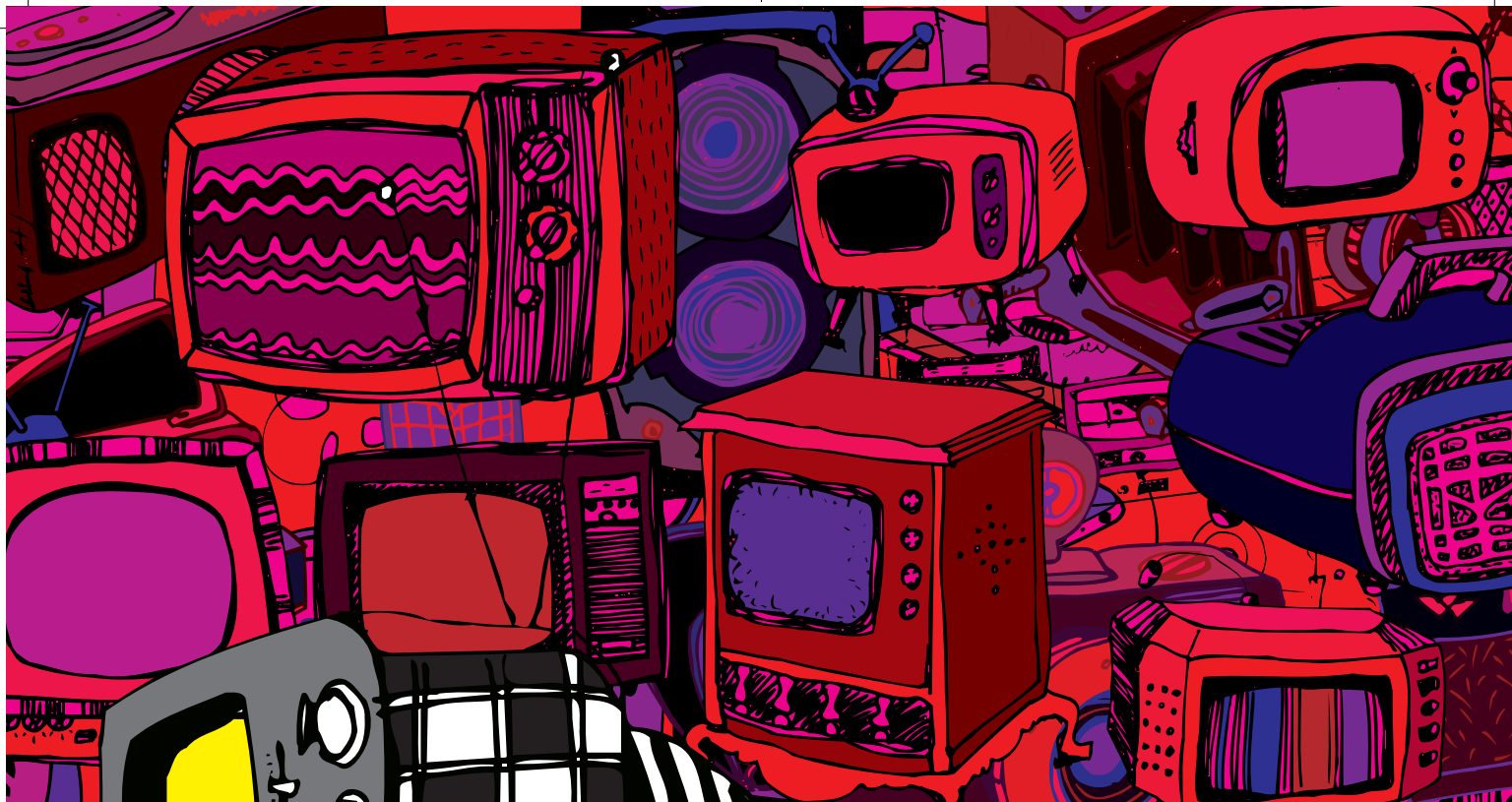
Media agencies, unsurprisingly, have been closely monitoring the nation’s viewing habits. Time-shifting and – in some cases – on-demand viewing can allow viewers to skip ads, interfering with the ‘opportunity to view’ metric that media companies use as their currency for marketing advertising slots.

In the 1990s, PVR company TiVo carried out some work on TV-watching behaviour in the US. It found that commercials were likely to be fast-forwarded during the programmes that people liked most – this is fairly intuitive given that these were the programmes that tended to be recorded for later playback in the first place. The study found that the average commercial break was skipped in 54% of cases, and that avoidance was particularly apparent during the most ‘highly involving’ programmes.

However, Les Binet – head of effectiveness at communications agency Adam & Eve DDB – doesn’t believe it’s a big problem. “A lot of people were very jumpy about what this [time-shifting] was going to do to the advertising business,” he says. “The assumption was that people would be time-shifting all their viewing, and skipping all the advertising. That hasn’t happened.”

Nevertheless, this opportunity to





skip ads, claims Phil Shaw – head of digital at Ipsos ASI – has led to a decline in ad-recognition levels. “We’ve noticed an overall softening in ad recognition – that is, people’s ability to remember seeing ads on TV. Our theory is that it’s down to an erosion of frequency,” says Shaw.

“You can still achieve the same reach, but frequency is being eroded, and that’s because viewers are able to skip, tune out, or change channels. People are able to get past the ads, and are not necessarily paying as much attention.”

There are a number of counter arguments to this. The first is that PVR owners watch more TV overall,

an assertion that is backed up by statistics; research from Nielsen found that VOD users in the US watch 20% more live TV than non-VOD users and more TV

overall. Another study in the US, by media analytics company Annalect, found that binge-viewing – the one-after-another consumption made possible by streaming and on-demand services – can also drive live TV viewing.

Binge viewing

“We found that nearly half of our respondents were finding new programmes as a result of their binge viewing, then continuing to watch those shows on live TV,” says Dr Pamela Marsh, director of primary research & insights at Annalect (in this case, binge-viewing is defined as watching three or more episodes of the same show in one sitting).

In addition to programme discovery, half of ‘bingers’ reported that they would start by watching catch-up TV on an on-demand or streaming service, and then tune in to watch new episodes on live TV. “They’re being exposed to more live

TV as a result of their bingeing,” says Marsh. “It has opened up more exposure for advertisers.”

The research also found that binge-viewers were more likely than non-binge-viewers to remember ads that they had seen, to discuss ads they had seen, and to share ads via social media.

Another argument is that viewers need to pay attention when fast-forwarding through a break, to know when to stop skipping – and, so, are still exposed to the ad content. Research by BSKyB suggests that even fast-forwarded ads can have some effect on viewers’ brand perceptions, although this was only the case if the ads were already familiar to them.

But, skipping ads is not new behaviour. “We’ve always been able to avoid ads,” says Agostino Di Falco, partnerships director at Channel 5. “It used to be you could leave the room to make a cup of tea, or channel hop during ad breaks. Now, in addition, you can fast forward via PVR.

“For the 10% of time when viewers watch a programme via PVR, 35-40% of ad breaks are viewed. This compares very favourably to ad avoidance in other media.”

▶ Only adverts watched at normal speed are counted by Barb, and – as such – are the only ones paid for by advertisers. Ads that are ‘speed-watched’ are not paid for.

This – coupled with the fact that the cost of TV-advertising spots has gone down over the past couple of decades – means that the return on investment (ROI) from advertising isn’t necessarily reduced, explains Binet. “This big fear that time-shifting was going to destroy ROI is just not true,” he says.

Another modifier of ROI in the age of multi-platform TV has been more sophisticated targeting. This can be done by demographic – a practice that has been commonplace for years, but which has been strengthened by the explosion in the number of channels, and the amount of data available on viewers – or by platform.

“ If you’re a family with young children, you’ll be shown a Pampers ad rather than an advert for a Saga cruise ”

An example of the former is Ad Smart, launched by Sky in August 2013, which delivers different ads to different Sky households watching the same programme. Ads are broadcast via set-top boxes within live ad breaks, and are tailored to the audience, using an algorithm that takes into account the projected linear audience, plus data that customers provide when they subscribe to the service. This is then supplemented with externally sourced behavioural data.

“The end result is that you see more ads that are more relevant to you, and fewer that won’t interest you,” says Matt Beake, corporate communications manager at BSkyB. “So – if you’re a family with young children – you’ll be shown a

Pampers ad rather than an ad for a Saga cruise.”

Channel 4 has also started to offer targeted advertising on its 4oD service. Demographic details about viewers are gathered by encouraging them to register to view 4oD. The service can be accessed without registering, but more and more content – such as archived content and ‘download to view’ – is being placed behind the registration wall.

According to research from comScore and MTM London, demographically targeted campaigns on 4oD resulted in an 11% increase in top of mind brand awareness and a 39% increase in spontaneous ad awareness.

While this level of offline targeting has been made possible through advances in set-top

box technology, it only applies to live TV – viewers watching the same content that has been recorded would see standard ads. But, according to Beake, Sky Media is looking into how to monetise VOD assets more effectively, bringing in an extra dimension of personalisation. “When you’re playing something at a particular time, maybe there’s an opportunity to advertise different products depending on when the media asset is played, or where it is played,” he says.

TV ‘NEED STATES’

According to Thinkbox’s research, there are six core reasons why we watch TV; these translate into six ‘need states’, each shaped by content, context and device. If advertisers match these need states and narratives, it should – in theory – lead to a better result for their brand.

Unwind

This need state reflects people’s desire to de-stress from the pressures of the day.

Comfort

This need state is centred on shared family time, and incorporates feelings of togetherness, rituals, family and routine.

Connect

This relates to the idea of ‘plugging in’, and feeling a sense of connection to society, time or place.

Experience

This links to the idea of a need for fun, and a sense of occasion to be shared.

Escape

This need state represents the desire to be taken on an enjoyable journey to another time and place.

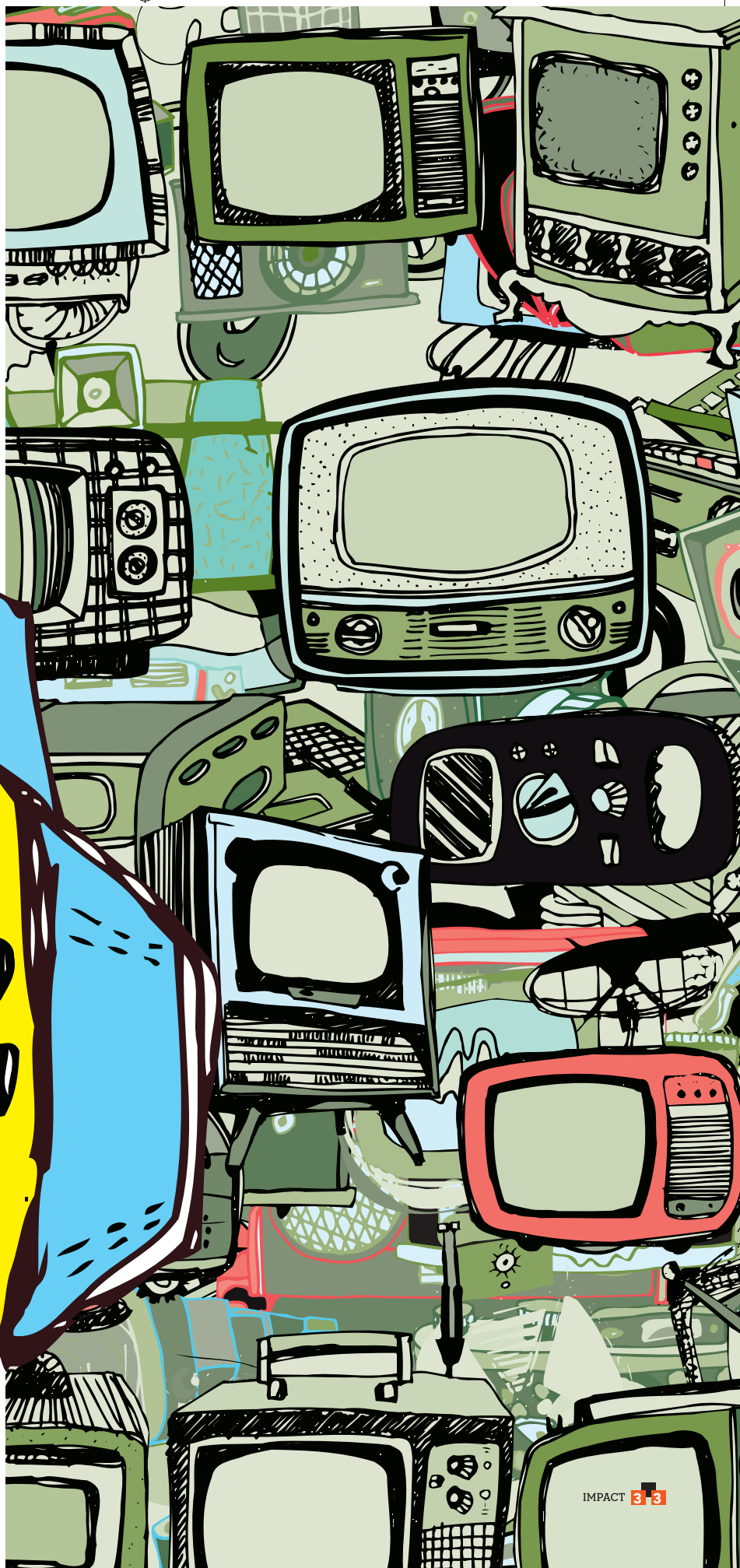
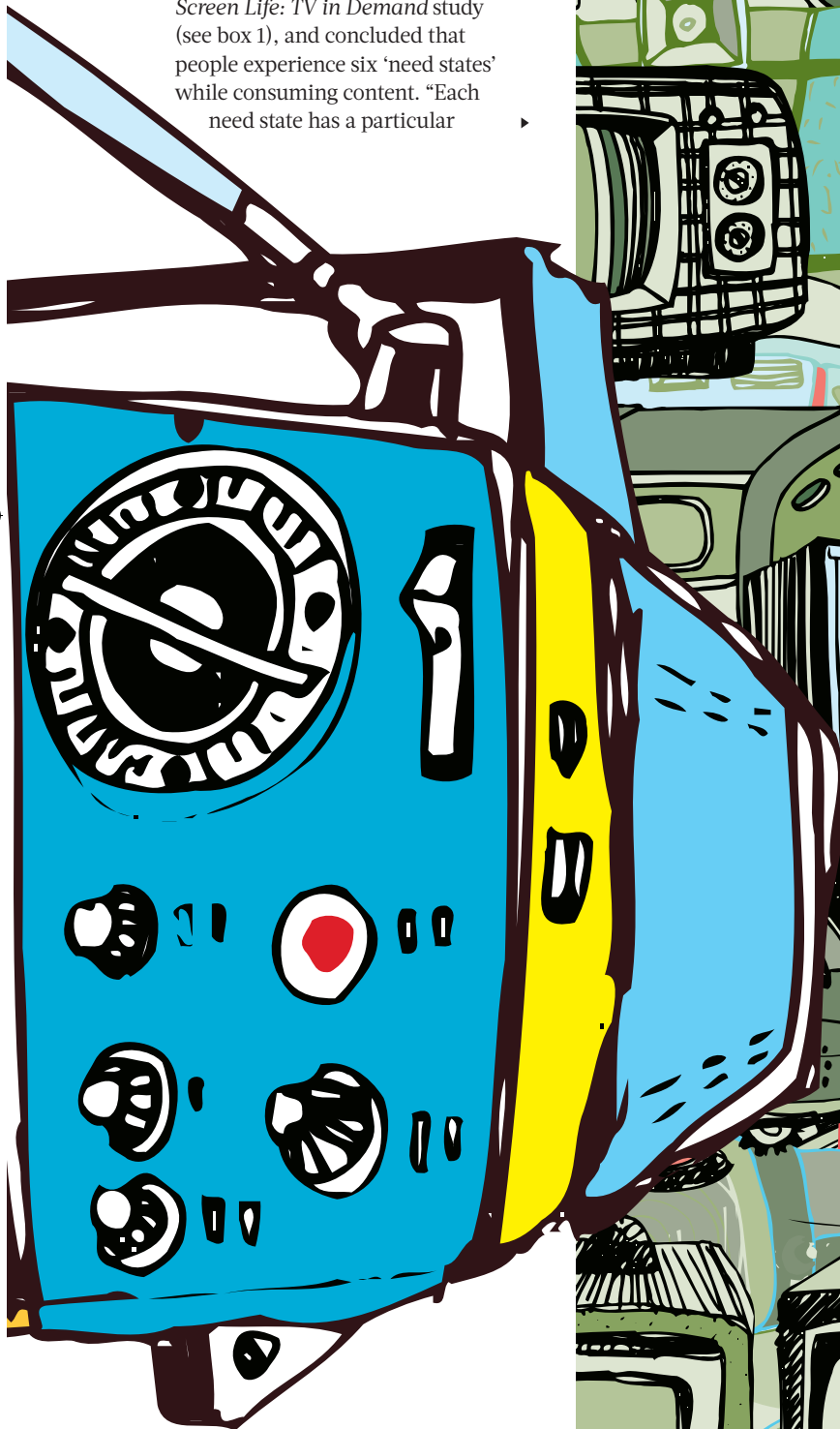
Indulge

This reflects the need to satisfy guilty pleasures with personal favourites, usually alone.

Context is key

Beake is alluding to the idea of the influence of context on viewers' receptivity to advertising. Given that time-shifted and VOD viewing can cause these factors to vary greatly, it's an important area to understand.

Thinkbox looked into this with its *Screen Life: TV in Demand* study (see box 1), and concluded that people experience six 'need states' while consuming content. "Each need state has a particular



psychological set-up in which certain content is more valued or appreciated,” says Mortensen. “We wanted to give advertisers these set-ups so they could match these need states and narratives, and hopefully get a better result for their brand.”

VOD viewing meets two separate need states – ‘escape’ and ‘indulge’ – as there is such a heavy focus on the content. “Advertising in the ‘escape’ need state is the most challenging,” he says. “There are high levels of attention and high levels of appointment-to-view, so advertisers need to work harder to get ad acceptance.”

The best way to leverage this need state, says Mortensen, is to fill slots in VOD viewing with advertising that fits escaping. Something that builds an identity for the consumer; offering them status or cool, such as luxury cars, jewellery and aspirational travel, for example.

The debate continues around how changes in TV viewing affect exposure to advertising, but one aspect of VOD and streaming is hard to argue against: it produces enormous amounts of viewing data. While live TV relies on representative sampling to report viewing figures, on-demand and streaming services can record each individual interaction. Will this ‘big data’ approach replace traditional panel-based measurement?

TV measurement

The ‘gold standard’ TV ratings in the UK have been gathered by Barb since 1981. It uses a representative panel of about 5,100 homes (12,000 people), installed with metering equipment (peplemeters) that records TV viewing – on PVRs, DVRs and VCRs, as well as standard set-top boxes – by detecting whether TV sets are on or off, and to which channels they are tuned.

Panellists are required to ‘register’ and ‘deregister’ when they enter a

room containing a TV set that is switched on – the Barb definition of TV viewing – and their demographic information is added to the viewing data. Since 2013, programmes recorded and watched up to 28 days after broadcast have also been included. However, some people believe that – in the age of big data – this nationally representative approach is no longer fit for purpose.

“There are 25m homes in the UK, and the only measurement that the entire industry can rely on is based on 5,100 households. That’s a pretty big gap,” says Aki Tsuchiya, founder and managing director of Streamhub,

“One aspect of VOD and streaming is hard to argue against: it produces enormous amounts of data”

which supplies real-time video analytics to the media industry. “No matter how amazing the statistical weighting of those 5,100 households is, it will never be truly representative, compared to what ‘real’ data can bring in.”

Tsuchiya argues that smaller channels, in particular, cannot rely on Barb data, because they often represent less than 1% of viewership and, as such, there is not enough granularity in the data. He believes the Netflix model – of making commissioning decisions based on complex analysis of massive amounts of viewing data – is the only way forward for TV.

Similarly, a report published by Warc, in 2011, pointed to passive television measurement as representing the future. This approach, the report says, has a number of advantages over the ‘peplemeter’ approach favoured by Barb: it offers continuous viewing data over long periods, for very low incremental cost; it can, in theory,

be combined with set-top box ‘census’ data to add demographic context; and there is decreased drop-out because the burden on the respondent is low.

It could also be a step towards the ‘web-style’ ad-exposure tracking that some researchers – such as Hamish McPharlin, director at Decipher Media Research – are hoping for from TV measurement.

“We don’t yet have great visibility on being able to survey someone we know has seen something on TV,” says McPharlin. “We can tag an online ad, drop a cookie, find that person, and send them a survey. We’ve got proof they’ve seen it.”

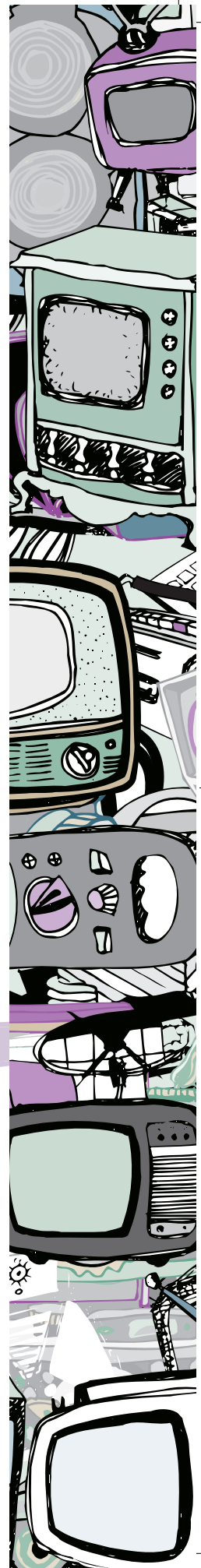
“You can do that online, on smartphones, and on tablets. The one place you can’t do it is on TVs. You have to resort to more expensive means, such as putting cameras into people’s homes and getting them to keep diaries – and it’s all a bit expensive and manual.”

Project Dovetail

A further barrier to a device-based data approach, says McPharlin, is that web-tracking assumes one person per screen – which, on a smartphone, may be accurate, but on a TV is less certain. The Barb panel, meanwhile, can provide exact information on how many people were in the room when a programme was watched.

Another is that it offers no information on that all-important idea of context. “Passive works well in terms of measuring activity. What’s still missing behind that is the motivation of why,” says Jim Ford, global development director at Ipsos.

“There will be a tipping point, at some stage, where the technology and the recruitment allow us to measure effectively as much activity as possible, passively – but what we still need to understand is the motivation for choosing that programme, brand, product or service. The danger is that, with all



THE INTERPLAY OF TV AND SOCIAL MEDIA

A quarter of UK adults – according to Ofcom – regularly ‘media mesh’, which is doing something in addition to watching TV, but related to what they’re watching. Examples include talking on the phone (16%) or texting (17%) about what they’re watching, and using social networks (11%) or apps to communicate directly with programmes (3%).

While some multi-screening behaviour can prove detrimental to ad and brand awareness, it has been suggested that social media activity in conjunction with TV watching can have the opposite effect. Research from Twitter’s Social TV Lab partnership with Starcom MediaVest Group revealed that brands using Twitter alongside TV advertising had an average 6.9% increase in awareness for exposed audiences. It also reported that TV-ad recall was higher among Twitter users.

Time-shifting and VOD services can interfere with this effect, but new services are appearing that can incorporate social media findings into ratings, as well as simulate the social TV environment outside of live TV.

Beamly

Formerly known as zeebox, Beamly describes itself as a “social TV app”, which encourages users to follow individual shows, as well as celebrities and other Beamly users. It uses a Shazam-style ‘SpotSynch’ tool: an automated advertising

platform, delivering targeted digital ads on smartphones and tablets that are synchronised with linear TV spots. Beamly OnDemand – an extension for Chrome – synchs tweets made during the original broadcast, to appear at the same time when that programme is watched by a Beamly user on catch-up TV.

Streamhub

Streamhub works like Google Analytics; tracking code is added into video players – including mobile and smart-TV apps – to gather data for that broadcaster or online service. If a programme is syndicated onto a platform such as Netflix or YouTube, that data is also incorporated to provide total viewing data. In addition, Streamhub measures the ROI of each programme by gathering data on how much ‘buzz’ it creates on social channels.

Peel

Peel offers personalised recommendations for linear TV – produced using a Netflix-style algorithm – via mobile devices. It allows users to track only the channels they care about, and Android smartphones to communicate with TV sets like a remote control. TV networks can track viewer engagement via unique URLs that point to where people can tune in to particular programmes. Ads for programmes can also be served on the app based on the user’s exposure to the same ad on TV.



GLOSSARY

Linear TV

'Live' TV, watched according to schedules controlled by the broadcaster.

PVR/DVR: Personal video recorder/digital video recorder

An interactive set-top box with recording capability, typically provided as part of a subscriber service (eg Sky+ or Virgin TV).

VOD: Video on demand

A system that allows users to select video content to watch whenever they want (eg BBC iPlayer, itv player or Channel 4's 4oD). Content is mostly streamed through a set-top box, computer or other device, but – in some cases – can also be downloaded.

SVOD: Subscription video on demand

Service charging a monthly fee for unlimited access to content (for example, Netflix, Amazon Instant Video).

Time-shifting

The recording of a programme to watch at a later date; the pausing of live TV; or the use of catch-up services provided by VOD. Can also refer to programmes recorded on VCRs, but has become more prevalent with the advent of PVRs/ DVRs. Can also be used to describe '+1' channels, which broadcast exactly the same content as the original channel, but one hour later.

VOSDAL: Viewing on same day as live

Watching a TV show through time-shifting or a VOD service on the same day that it was broadcast – but not live.

Smart TV

A TV set with in-built internet functionality. Users connect a broadband router directly to the TV.

Internet-enabled TV

Any TV set connected to the internet via a third-party device, such as a set-top box, games console or laptop/PC.

▶ the big databases, you're just looking at response. However, without thinking about the motivations of that response, you get nowhere."

Martin Greenbank, head of advertising research and development at Channel 4, believes Barb's 'traditional', representative-sample approach is vital to anchor findings from big data.

"It [Barb] is the first port of call for all broadcasters, representing a macro picture of UK viewing," he says. "Of course, for a channel

such as London Live – for whom two Barb respondents watching represents a good audience – it's a little different. You don't get the level of granularity you might need. But if you just look at big data, it's skewed. It's not representative."

Greenbank believes that the future of media research lies in a fusion of representative samples and big data.

Through its latest undertaking – Project Dovetail – Barb is developing the ability to harness device-based data, with a view to achieving this mix of big data and context.

The first stage of this is its work alongside broadcasters to embed a software development kit (SDK) plug-in into all VOD apps that collect information on what is being watched. "This will give us – not just within our panel, but every time anyone requests content – a very precise measurement of the devices: the number of devices that have requested a particular programme, and how long they have watched that programme for," says Sampson. "It's effectively a census-level count."

Barb is also looking into the possibility of incorporating return-path data from PVRs into its

dataset. In each of the homes on Barb's panel, the viewing data on devices – including set-top boxes, games consoles, and laptop and desktop computers – will also be tracked, covering around 30,000 devices in total.

The intention, says Sampson, is to fuse this data with data collected through its peplemeters. In order for this data to incorporate the context lacking in other 'big data' approaches, Barb – in partnership with market research company Ipsos MORI – is trialling a tablet peplemeter.

As well as recording panellists' presence in a room with a switched-on TV, the tablet uses a combination of audio watermarking and fingerprinting to establish what is being watched in that room – on any device. Watermarking identifies broadcaster content, while fingerprinting discriminates between different content-use cases, for greater accuracy.

The future?

There are still drawbacks to this: passive measurement can only capture an individual's presence in the vicinity of an audio signal; it cannot offer any information on how intently – if at all – that person is watching the broadcast.

With this in mind, Thinkbox is continuing its exploration of TV viewing by adopting a CCTV approach – setting up multiple cameras in lounges, as well as asking respondents to wear HD glasses as they go about their everyday business.

It has also enlisted the help of an anthropologist – to observe and interpret participants' behaviour – and a memory expert, who will investigate how audio could play a more significant role in message delivery, given the amount of visual stimulation that comes from multiscreening behaviour.

While, in theory, media researchers could capture this

information, many believe it may be a step too far, especially when working within the confines of data privacy.

"The technology is out there to capture the multimedia world: you have got Google Glass, GPS and scanning devices," says Ford. "I often use the example that you could put a helmet with a camera, a GPS device, and a barcode scanner on someone, and you could capture everything that they ever do. But no one's going to do that."

What's more, not all advertising is geared up to generate an instant sales response. Some products are promoted in a way that attempts to

“ You could put a camera, GPS device and barcode scanner on someone, and capture everything they do but no-one's going to do that ”

build a relationship with potential customers, so that – when they do make a purchase – that brand will be 'front of mind'.

The impact of this kind of advertising, says Ipsos's Shaw, can only really be assessed through the often-forgotten research approach of asking questions.

"The overarching trend is moving toward behavioural metrics and proven behaviours, and I guess that's because of digital – and because the technology allows you to do that," says Shaw.

"But, as much as you can look at sales, there's also a lot of brand-building – perhaps for a car that someone might not buy for two years. Brands want to form an impression in customers' minds for when they get to that purchase – and, to know if you're starting to move people, you have to ask them their opinion." ■

Deep-dive into drinking occasions





With brewers facing competition from inside – and outside – the category, insight is critical for maintaining relevance, as **Mick Doran**, head of strategic insights at Heineken UK, explains. By *Lucy Fisher*

Five years into his insights role at Heineken UK, Mick Doran believes that the brewing industry is learning valuable lessons from other FMCG sectors in becoming more consumer-inspired and brand-led. “It’s not just about selling great-tasting cider and beer,” he explains. “It’s about having a category vision, and promoting engagement and enjoyment.”

Doran points out that Heineken has gone from what he describes as “little” innovation to more than 10% of its overall sales coming from new brands, or brand extensions. It’s clear that the years he spent – before joining the brewer – working at FMCG giants PepsiCo and Procter & Gamble have given him a solid training in how to harness insight to maintain relevance in a fast-moving consumer landscape.

“People get a narrow focus and forget the big picture,” he says. “When you look at FMCG companies, for most of them, it starts with a vision. The ‘F’ is about the speed of the decisions people make every second of the day. It’s about working out how best you can influence what triggers those decisions.”

Doran says that he’s fortunate at Heineken to now work in an environment in which there is “quite a healthy” investment into insight. As head of the consumer and market intelligence team of nine people, his goal is to harness research to help maintain the company’s standing as the No1 brewer in the UK, in terms of both value and volume sales (source: BBPA, Nielsen, CGA).

Heineken owns 14 brands in the UK – including Foster’s, Strongbow, Bulmers and Desperados – and Doran’s team functions as part of a 100-strong marketing department. Since he joined the brewer, Doran has established a



CV
MICK
DORAN

2011 – present:
Head of
strategic insights,
Heineken UK

2009 – 2011:
Category insights
controller,
Heineken UK

2006 – 2009:
European consumer
and market insights
director, PepsiCo

2004 – 2006:
Asia regional
innovation insights
manager, PepsiCo

2001 – 2004:
Consumer insight
manager,
Marlow Foods

1996 – 2001:
Consumer and
product researcher,
Procter & Gamble

shopper segmentation framework, which he says has helped his department to have more fruitful discussions with consumers, as well as internally. The ultimate aim of this segmentation is for Heineken to deliver products that meet changing consumer wants or needs, by looking at the ‘what, who, when, where, why’ – and the ‘why not’ – of shopping decisions.

“We used to talk about shoppers as if they were one big amorphous blob,” he points out. “This framework is about ensuring their needs are better met.”

Agency Insight Inside worked alongside Heineken to develop and update the segmentation to reflect changing consumption patterns, such as a growing interest in low- or no-alcohol versions of products (see ‘Everything in moderation’ box), and increased drinking at home, rather than in pubs. Partner Michael Martin explains that this information was then used as a springboard to help Heineken deliver an optimum brand portfolio strategy.

He says that the segmentation allows Heineken to take a strategic view of competing drinks, the role of beer, and how its overall offering can evolve. Martin points out, too, that much of the research conducted to develop the tool was carried out online – which, he adds, helps when it comes to ensuring consumers are honest about their drinking habits.

“We go into a lot of detail about the specific occasion,” says Martin. “People tend to be quite honest when speaking about an occasion. It was about understanding comparatives, too, and how this translates into triggers and values.”

Martin believes that this work helped Heineken to maintain growth at a time when the beer category was contracting. “It’s about helping

► calculate where to place your bets," he says. "All businesses are constantly trying to find new places, new spaces for growth."

"It's quite tough in the beer category," adds Peter Walshe, global BrandZ director at Millward Brown, which publishes an annual study to identify the world's most valuable global brands. Its latest study pointed to attempts by the world's four largest global brewers – including Heineken – to ensure they had brands within their portfolios to meet the needs of drinkers in mature – or developed – markets, seeking new tastes and experiences.

As beer is quite a commoditised, promotion-driven market, mass-market offerings such as Heineken have to work hard to stand out.

"The brand needs to be differentiated, which requires innovation," explains Walshe – who points out that innovation, of course, requires insight, to ensure offerings are relevant to each target market. "In supermarkets, it's strongly driven by price, and that's tough for the likes of Heineken, a mass-market brand."

For Doran, the answer to such challenges is to "deep-dive" into drinkers' needs on the specific occasions they choose a beverage: "For instance, is it to sip and unwind? Do they want a refreshing drink, or a drink to liven them up, or to help them transition from one part of the day to the next?"

Heineken has had a busy year in terms of product launches and new brands – bringing to market, earlier this year, a range of new offerings such as Affligem, Old Mout Cider, Foster's Radler 0.0%, Desperados Verde, Strongbow Citrus Edge, Bulmers Indian Summer, and Bulmers Five Fruit Harvest – both of which are 2.8% abv (alcohol by volume) products. Doran, who is passionate about what he does, admits that – when he's shopping – he can't resist checking all the new products and how categories are presented, much to the annoyance of his wife, if she is present.

Rosaleen Goldrick, group director in the consumer team at TNS UK, has also been working closely with Heineken on its

innovation and product development strategy – looking at pack permutations and flavour variants, for instance, and asking whether its brands are meeting the needs of various shopper segments.

"We embed the shopper segmentation into every piece of research we undertake on its



“Do people want a drink to sip and unwind? A refreshing drink, or a drink to liven them up, or to help them transition from one part of the day to the next?”



behalf," she says. "When we're working on the innovation pipeline, we ask which of the propositions that we're testing represents an incremental growth opportunity for Heineken, and doesn't risk cannibalisation of sales from other brands within the portfolio."

There are other pressures on brewers these days: as well as the range of choice in the market, the rise of price promotions and heavy discounting in supermarkets has hit the brands hard. Tim Eales, senior insight director at IRI – which has been calling on manufacturers to review their promotional strategies, to assess whether they are working to the benefit of the long-term future of brands – points out that the level of promotion has gone up continuously for the past 12 to 15 years. While, in the past 18 months to two years, it has gone down slightly, says Eales, the cost to the grocery business and to manufacturers is huge.

Doran describes heavy discounting as a "drug that gets abused", and he predicts a rise in more creative types of value-add promotions, designed around what motivates people. "Price is only one lever," he says. "We've done research into understanding take-up and price elasticity, for the



EVERYTHING IN MODERATION

Heineken has identified what Doran refers to as 'moderation' products – which are lower in alcohol – as being an area ripe for innovation, as consumers increasingly make what are perceived to be healthier choices.

As a result, a range of light, easy-drinking – and often fruity – products have been launched, such as Foster's Radler, and Bulmers' low-alcohol products. They are designed to be refreshing without containing a high alcohol content.

"It's about offering more than just shandy," explains Doran. "It's about having a vision for the moderation category, and responding to what people are doing. People are looking for credible low- or no-alcohol options, which still taste good. For instance, Foster's Radler – which was launched in the UK just over a year ago – is cut with lemon, and has only 2% abv."

By broadening its range of moderation offerings, Heineken aims to bring new consumers into the category. Doran's team conducted research to understand motivations, barriers, and behaviours within the world of moderation drinking, to identify potential areas for growth. The insight function has also helped to shape the offering in terms of merchandising and shopper activation, by combining qualitative and quantitative research techniques, including online forums, in-depth interviews, ethnography, and concept testing.

So-called 'moderation bays' are being rolled out in supermarkets, borne from the insight that such options are not always in people's minds. The aim is to trigger interest in the category, which Heineken has predicted could reach £200m by 2020. The moderation category is now worth £53m annually, and is growing at 61% year on year,

according to data from Nielsen.

In the past, low- or no-alcohol drinks have struggled to make a significant impact. Doran claims the big difference now is that – as well as producing better tasting drinks – the brand understands the motivations of people who want a product like this, and the occasions when they would want it.

"We are also working with retailers to present these products in a more educational way; helping consumers understand there doesn't need to be a trade-off re taste. We are investing money to communicate these products, and doing lots of sampling, so people have a risk-free way of tasting the products," Doran says.

"This backs our assertion that the category brings new shoppers," says Joanne Cunningham, category and shopper intelligence manager, Heineken UK. "It meets previously unmet consumer needs."



► optimum level of promotion. It was the same at PepsiCo with the Tropicana brand. You have to ask, 'what's the optimum, so that the shopper is happy, without discounts having a negative impact on brand?'"

He believes talking to consumers at the point of purchase is key to discovering their true motivations, and, for this reason, he emphasises the importance of ethnographic research. "We need to look at what they do – not just what they say – to feed our insight-generation process," Doran says. "It's about observation, close to the point of consumption."

"Humans aren't rational," he adds, pointing out that it's important to leverage numerous research techniques in what he describes as something of a "bricolage" approach.

"Focus groups have a role, but they can be filtered – and our consumers don't spend all their time thinking about beer," he says. "It's the same with nappies, with skincare... it's important to understand the broader life context."

At a global level, Doran says that Heineken is looking into new research techniques, such as neuroscience. Via media giant AOL, the brewer also benefited from some research – conducted by emotional analytics platform Realeyes – that looked at how people feel when they watch videos online.

Mikkel Jäättmä, CEO at Realeyes, explains that this involved people watching videos via a webcam – which could be on a phone or a laptop,



at home or at work – so that the research was conducted in a very natural setting. The aim was to discover the optimal length of video advertising online, as well as which storylines worked best in which markets, given that the technology is able to register emotions such as surprise or shock. Jäättmä sees this technique as having a clear link with ethnographic research. "It's contextual," he says. "It's not reporting, but observation."

Doran is adamant, too, that disseminating insight throughout the organisation – and ensuring that it is useful and relevant, and that his team has a say at the decision-making table – is central to his role. "We're not a university," he points out. "The goal of our research is not knowledge acquisition, but better decision-making and action."

"Individuals have to learn to influence, and to be better storytellers. It's about taking what we do, and making it live and breathe," he says. "When I first joined, I was a bit surprised; brewing is a fantastic tradition, and Heineken is a family owned business, and that's all well and good – but you need to have your finger on the pulse."

"People's choices of beverage consumption have changed. Now, I might meet a friend in Starbucks, whereas before it would have been in a pub. It's no longer beer versus beer. All types of drink represent a potential competitor. Our work is about putting the consumer at the heart of the organisation." ■



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All the world's

The Royal Shakespeare Company has to balance artistic excellence of the Royal Shakespeare Company with commercial success, and an educational remit, to ensure the needs of all demographics are met, writes **Jane Simms**



Christmas show *Wendy & Peter Pan* attracted a wider audience to the RSC

a stage



Becky Loftus, head of audience insight at the Royal Shakespeare Company (RSC), joined the team four years ago this month, at a critical point in the organisation’s 139-year history. The Royal Shakespeare Theatre and Swan Theatre – in the company’s home town of Stratford-upon-Avon – had just reopened after a major redevelopment, and the RSC’s musical adaptation of Roald Dahl’s *Matilda*, which has turned out to be a big commercial hit, was about to open.

While this made it “a great time to join”, says Loftus, the company also faced a combination of challenges. In common with other arts organisations, the RSC was still feeling the effect of the recession – in the form of depressed ticket sales – and the government was paring back its funding. “We have to be more and more commercial,” says Loftus, “but – at the same time – fulfil our societal obligations, including producing great art, being very accessible, reaching a wider range of socio-economic groups and continuing our educational work with schools.”

Loftus’s role is to help to identify opportunities that hit the ‘sweet spot’ of artistic excellence and financial success, which – in turn – allow the company to fund outreach programmes it would otherwise be unable to afford. Its recent adaptations of Hilary Mantel’s Man Booker Prize-winning novels, *Wolf Hall* and *Bring Up the Bodies* – based on the life of Henry VIII’s adviser Thomas Cromwell – are classic examples.

“The commercial success of productions like these allows us to put on shows such as the interactive version of *The Tempest* that we staged recently for autistic children. That was hugely successful [in artistic and engagement terms], and we couldn’t have afforded to do it commercially,” Loftus says.

At a more specific level, Loftus’s task is to widen the demographics of its audience members, and to help the RSC engage with them more effectively. Growing commercial and competitive pressures mean organisations have to work harder and harder to reach audiences, which requires a much better understanding of them – hence Loftus’s appointment into what was a new role.

▶ She is one of just 10 people in the RSC's marketing team, yet her role is more challenging than any of her previous jobs – working with big marketing organisations in the commercial sector – and not just because budgets are tight.

Loftus spent a decade as a consumer insight specialist at Jaguar Land Rover, followed by a two-year stint at research agencies MMR Worldwide and International Research Consultants, where her clients included the likes of Coca-Cola, Johnson & Johnson, and Danone. But her appointment to the RSC seems like a match made in heaven.

“They wanted someone with commercial experience, and I love the theatre, I have always enjoyed the client side more than the agency side, and thought I could transfer my knowledge and expertise into a role that I knew would be highly enjoyable,” she says.

Loftus has proved herself right, helped by her ability to adapt to a very different internal audience. “My challenge is to communicate the statistics in a way that people can understand,” she explains. “They are artistic – used to stories and emotions – so I have to use the stats to tell stories. I am used to standing up and talking to rooms full of senior people, but, here, I'm performing to performers – which, at the outset, could be quite intimidating.”

Value for money

Loftus has a broad remit; her work covers not just audiences' opinions of productions, but also what they think of every aspect of the theatre experience, including catering, retail, exhibitions, tours, customer service, booking, seating, communications, value for money and

The commercial success of the RSC's adaptation of Hilary Mantel's *Wolf Hall* allowed the company to stage an interactive production of *The Tempest* for autistic children



the RSC brand. She is also heavily involved in funding applications for capital projects – when we spoke, the RSC had just secured a £3m Arts Council grant to reinstate its studio theatre, The Other Place – and in reporting back to the government on the benefits reaped from its funding.

“Our reporting requirements are hefty,” she says. “We have to demonstrate that we use public money responsibly.”


“They are artistic – used to stories and emotions – so I have to use the stats to tell stories”

Flexible pricing

At one end of the spectrum, Loftus's research might affect the future of a production – whether it should be extended, for example. At the other end, it results in changes that may seem prosaic, but which are fundamental to the audience experience – such as muffling the chairs in the café because participants in the regular visitor survey complained about the noise.

Loftus has also led the charge on flexible pricing, which has made a significant difference to the RSC's income since it was introduced for last year's winter season, and has also resulted in audiences' perceptions of value for money rising to record levels.

“The socio-demographics weren't adversely affected either,” she notes. “Indeed, for *Wendy & Peter Pan* [the Christmas family show] we broadened the audience to wider groups as a result of flexible pricing.” This is where theatres charge more for seats at popular times so they can reduce prices at less convenient times.



CV

BECKY LOFTUS

Education: University of Bristol (MEng).

1993: Joins CarnaudMetalbox as a graduate engineer trainee.

1999: Joins Jaguar Land Rover

as a design engineer, switching to a consumer insight role two years later.

2008: Joins International Research Consultants as research director.

2009: Joins MMR Worldwide as associate director.

2010: Joins RSC as head of audience insight.



David Tennant starred in last year's production of *Richard II*, which was also broadcast live to UK cinema audiences as part of the RSC's push to make Shakespeare accessible

Loftus uses the gamut of research tools and techniques to find out what customers of the RSC are doing – and why – from old-fashioned pen and paper to leading-edge technology. A mobile app was trialled during the three-month run of *Wendy & Peter Pan*, and Loftus says she would use it again to augment – but not replace – some aspects of research depending on the audience and situation.

The purpose of the trial was to capture the excitement and exhilaration 'of the moment', while people were in the theatre. The thinking was that the app would be more cost-effective than traditional qualitative research, and overcome the logistical hurdle of gathering qualitative data immediately before, during or after a show; Loftus hoped it would also capture feedback from children as well as adults.

Compelling

The trial did, indeed, capture some rich feedback from the audience – both specific (the very technical set was a key feature in children's enjoyment of the performance, for example), and more general (advocacy, anticipation and mystery were important in building excitement before the show). Some – such as video clips, captured through the app, of children at the performance – was compelling justification for staging a show on this scale (see panel).

However, Loftus is impatient with those who claim mobile is 'the future of research'. "Mobile provides different insights," she says. "It's not about capturing the same insights, differently."

The responsiveness and immediacy of a mobile app as a research tool may be second to none, but the theatre is a much more dynamic environment than the commercial world, observes Loftus. "Things happen very quickly here," she says.

"It takes four years to design a car, but theatre is ephemeral: it takes about a year to get something on stage, it runs for a few weeks, and then, usually, it's gone. So you live more in the moment, and have to react quickly."

For example, the decision to broadcast live screenings from the RSC in cinemas last year happened very fast, and was informed by audience insight.

"The previous year, we had conducted research into the RSC brand among a representative sample of the UK population," Loftus explains. "It showed that we are the best-known theatre company in the UK, with 74% of the population aware of us, and nearly one-third having seen an RSC production. Respondents also showed significant interest in the idea of live screenings."

The research gave the company the confidence to press ahead, which it did with *Richard II*, starring David Tennant.

Subsequent research showed that audiences rated the cinema experience just as highly as the theatre experience – but for different reasons. Theatre audiences enjoy the thrill of the live performance, but the cinema version – with its close-ups of actors – made the Shakespearean language more accessible to many, who subconsciously lip-read along.

FACT FILE

RSC

- A registered charity, the RSC generates around 73% of its own income, which – in 2012/13 – totalled £62.6m.

- Expenditure was £62.6m, of which £42.7m went on productions.

- The RSC is the best-known theatre company in the UK: 74% of the UK population are aware of it, and nearly one-third has seen – or would consider seeing – an RSC production.

- One million people visit the Stratford-upon-Avon theatres every year.

- The Shakespeare Memorial Theatre opened in 1879.

- The company was renamed the Royal Shakespeare Company in 1961.

▶ “We had hoped to bring in a different audience to the cinema, and we did – one-quarter of cinema audience members were first-time RSC attendees – but it was older people, rather than the younger people we’d expected,” says Loftus.

Judging by rising ticket sales (up from 1.1m in 2012 to 1.7m last year), Loftus’s contribution is being felt in financial terms – but she is proudest of broadening the ethnic diversity of audiences. “The proportion of people in our audience who describe themselves as being from a black or minority ethnic background has risen from 2% to 3% – so it’s still very small, but the population of Stratford and its immediate surrounding area is predominantly white,” she says.

Loftus runs a community development forum in Birmingham, and helps to build bridges with areas of social deprivation by arranging talks, staging shows in the community, and bringing people to Stratford. “We did a production of *Julius Caesar* set in Africa, with a black British cast, and it worked very well,” she says.

“We’ve a very willing audience. Theatre is special; people are keen to tell you what they think”



Catherine Mallyon – executive director of the RSC, and the impetus behind the big annual research projects Loftus runs to answer what she calls “big strategic questions” – says Loftus is “very engaged with insight work, and always keen to know what we need to do to make things happen”. This year, the strategic focus is on the propensity of people who live an hour’s drive away to visit the theatre – but is there a danger you can over-research the audience?

“We have a very willing and educated audience,” says Loftus. “Our survey response rate is 20-30%, which is very good. Theatre is special: people are keen to tell you what they think, and we get lots of spontaneous feedback.”

Loftus is frantically – but enjoyably – busy, and is currently providing input into the marketing and communications strategy to mark the 400th anniversary of Shakespeare’s death, in 2016. “I said I would do the job until I got bored,” she says. “I’ve had no time to get bored, and the RSC has a way of hooking people in. The way I’m going, I might be up for a long-service award.” ■

THE MOBILE APP TRIAL

All adults who purchased a family ticket – and agreed to be contacted – were sent an email invitation to take part in the app survey. The invitation contained a link to an online survey, for participants to provide basic socio-demographic information and consent to further communication.

They were also given detailed instructions on how to download the app onto their smartphone. The incentive was entry into a prize draw.

MMR Research Worldwide helped Loftus to conduct the trial, but the RSC handled all communication. Messages were sent to participants two weeks before the show – and two days before – as well as two weeks after it, to remind them to complete the survey. This was designed to capture the ‘emotional journey’ involved in going to the theatre.

The show was characterised by a very complex and sophisticated set and staging, which included the actors being able to ‘fly’. Not surprisingly,

excitement about the flying was a key feature of the children’s pre-show anticipation, but other comments included “friends said it was good”, “we don’t know what it’s going to be like”, “I know the story of Peter Pan”, and “I’ve been/not been to the RSC before”.

Having seen the production, the reasons for the children’s excitement and enjoyment were more focused. Flying still featured, but so did specific characters, such as the pirates, Hook, Wendy and Peter. The staging and costumes were remarked on too.

The overwhelming response from adults was “excitement”, but they also picked up on the content of the play (“emotional” and “moving”) as well as the general experience (“magical”). By the time the children talked about the production – two weeks later – they had become aware of some of the nuances. They enjoyed aspects of “girl power”, thought Tinkerbell “very funny and rude”, and were touched by

the death of one of the characters. However, the staging and set – particularly the ship, the lost boys’ den, and the flying scenes – still loomed large in their memories.

The app allowed Loftus to collect key data at different points from the same group of engaged respondents, but it wasn’t all plain sailing. Response rates were far lower than for the usual online survey – many dropped out when it came to downloading the app to their phone. While 50% of family ticket bookers who are sent an online survey open it – and 10% click through – total response rates to the app survey were 1.8% before the show, 1.1% at the performance and 0.9% two weeks afterwards.

“We were realistic,” says Pippa Bailey, innovation director of MMR Worldwide. “We thought we might get about 100 completes – we got 50 who did all three stages. But the quality of the data made up for the lack of quantity.”



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A matter of trust

Understanding the problems and the requirements of society's most disadvantaged young people requires insight and imagination, as **Jane Bainbridge** discovered when she talked to the Prince's Trust

When the recession hit, few sections of society were unaffected by the bleaker economic climate, and by the coalition government's imposed austerity measures. However, of those left tightening their purse-strings and adjusting their behaviour, 16- to 24-year-olds have felt more than their fair share of the downturn pain.

In 2011, youth unemployment hit the one-million mark (June to August) – or 21.3% of young people. It was the highest level recorded since measurement of this type began in 1992. While the situation has since improved – 767,000 young people were unemployed in the period April to June 2014, and the unemployment rate fell to 16.9% – it is still a tough time for youngsters.

This is where the Prince's Trust comes in; dedicated to helping disadvantaged young people in the UK, it has been busier than ever since the first waves of the economic crisis.

"We've had a lot of people coming to us because of the recession – finding themselves even further from the jobs market than they might have expected," says Lucy Richards, the Trust's acting director of marketing and communications.

"If graduates are struggling to get jobs, then people leaving school with no qualifications – who have always struggled at school, or with problems at home – are going to be pushed even further from those jobs. We've made a concerted effort to help more young people because there are more that need our help."

However, even though it's a greater problem since the recession, it's the same problem from a marketing point of view, Richards points out. "The people we're trying to reach are the same people – even though it's at a time when more graduates

are unemployed, our aim is still to help the most disadvantaged young people. We're aiming at the hard to reach, so it's still hard to reach them."

Broad scope

The Prince's Trust was founded by the Prince of Wales in 1976. Its aim is to support 13- to 30-year-olds who are unemployed, struggling at school and at risk of exclusion, those who are in – or have left – care and may be faced with homelessness or mental health issues, and those who have been in trouble with the law.

Its scope is broad, therefore, and – as a charity – it not only has to understand the people it is helping, but also those from whom it can raise funds. Unsurprisingly, Richards describes research as "extremely important" to the organisation, and says it uses the findings in "a whole variety of ways". The core part of the Trust's annual research is its Youth Index. This helps the charity to gauge how young people feel about their lives, and their confidence about the future – and includes a happiness index.

"YouGov helped us set it up, so we used its expertise," says Richards. "Costs are always an issue for charities, and it [YouGov] gave us the first couple of Youth Indexes for free. It was clearly a useful tool, so it became something that funders saw the value of." The Index is currently sponsored by the Macquarie Group.

"Index informs the whole organisation," says Richards. "It started as a piece of work for the policy team; we want to stay an authority on youth issues and we can only do that if we keep up with the research. We know a lot anecdotally, but, often, we need it written down – and, for local and central government, it's crucial to have



Lucy Richards, acting director of marketing and communications

MAIN IMAGE
Dennis Mkurazhizha from Kettering experienced mental health issues before turning to The Prince's Trust for support. He has since started a degree in nursing

INSET IMAGE
Lucie Campbell struggled with family problems and post-natal depression before the charity helped her set up an adult and toddler fitness business, Jumping Jacks ABC



55,801

number of young
people supported
by the Prince's
Trust last year

► quantitative data too. It demonstrates that there's a range of issues that young people face."

The Trust's most recent Youth Index made grim reading, spelling out the emotional impact that unemployment has on the young. Those who are out of work are more than twice as likely as their peers to have been prescribed anti-depressants, and 40% say they have experienced mental health issues – including suicidal thoughts, feelings of self-loathing and panic attacks. One in four (24%) long-term unemployed young people has self-harmed, and one in three (32%) has felt suicidal. The index also identified clear gender differences, with girls at greater risk of mental health issues.

Glimmer of hope

It also showed that among disadvantaged youth – otherwise known as Neets (not in employment, education or training) – confidence and happiness have decreased, with the index for this dropping from 64 in 2013 to 61 in 2014. However, there was a glimmer of hope: the total index score of happiness and confidence for all youth – rose one point in 2014 compared with 2013, to 72.

The Youth Index is a quantitative study – YouGov questions 2,161 young people, aged 16 to 25, via an online poll – but it also conducts qualitative focus groups on a more ad-hoc basis.

"We're looking at all our messaging across the Trust and making sure that we are talking to the right people, and saying the right things," says Richards. "It sounds basic, but you need to keep reviewing it – times change, young people change, and we still need to reach them. When I started at the Trust, six years ago, the best way to talk to them was on local radio – and now it's



THE PRINCE'S TRUST 'SKILLS CRUNCH' REPORT

In August 2014, the Prince's Trust published a report, warning that the UK could face a skills crisis if it failed to upskill the next generation of young people.

The charity conducted a survey with research agency Loudhouse, interviewing more than 600 business leaders from a range of sectors across the country.

The study revealed that nearly three-quarters (73%) of British businesses believe a significant skills crisis will hit the UK within the next three years, and that more than two-thirds (68%) fear skills shortages will put the brakes on the UK's economic recovery.

According to the research, almost three-quarters (72%) of business

leaders believe that the recruitment of young people into the workforce is vital to avert a skills crisis.

The Prince's Trust published the report on its website and sent it to the media, gaining widespread coverage.

An infographic about the research was shared more than 400 times on Facebook, while a blog

post on LinkedIn – from one of the charity's directors – attracted more than 820 views.

The report has helped raise awareness of a key issue affecting UK young people, while also encouraging employers to work with the Prince's Trust to help young people gain the skills and confidence they need to find work.



3 in 4 young people supported by the Prince's Trust move into work, education or training

MAIN IMAGE
Simon Gemmell secured an apprenticeship with a logistics firm following The Prince's Trust Team programme

INSET IMAGE
Kayleigh Bateman turned her life around after a very difficult childhood and now looks after children with autism and special educational needs

moved on. In the age of social media, we need to talk to them on digital platforms. So you can't rely on old data."

Using TGI data, the Trust has been working to build up a clearer view of what type of people are relevant to the charity, identifying different personas. This has involved a mixture of qualitative and quantitative techniques over the past six to 12 months.

"I think we'll end up with seven personas," says Richards. "[They'll range] from the young people we're targeting because they need our help, to people who are interested in the charity for another reason – whether it's because they want to volunteer, refer a young person to us, or they want to take part in a fundraising activity. It's a really hard thing to categorise them, but personas ▶

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are a great way of checking your comms – and you can't create the personas without doing the research behind them. So it's been a long process, but we're nearing the end now."

The personas will influence various aspects of the charity's work. "It will inform our own media: websites, social media platforms, any advertising we do. It'll also inform our PR team, who need to talk to the press," says Richards.

What the research has established is the variety of people that the Trust needs to reach. "Even the group of young people is more diverse than you think. Our programmes will stretch from helping a 13-year-old who is disengaged from school, has probably had family problems and grown up in care, and is feeling very isolated – they might not even know what they need, but they know, if someone offered them a helping hand, that would be a good thing. For example, we have clubs in schools, and a teacher might say to them: 'Do you want to be part of the Prince's Trust club?' – but they wouldn't go out on a limb to say 'I'd like to be part of that'.

"At the other end of the scale, you've got young people – a little older – who might look us up online because they want to set up their own business. In between, are people who are a bit more self-aware than the 13-year-old, but who still need convincing that the Prince's Trust can help them."

Mentoring

Programmes – such as school clubs – are a key way for the Prince's Trust to reach and help young people. There are seven in total, and they are all designed to give practical and financial support to youngsters who need to stabilise their lives.

For example, the Team programme is a 12-week personal development course that includes work experience, practical skills and community projects. The xl clubs are aimed at 13- to 19-year-olds who are at risk of underachievement or exclusion from school, and the Trust also runs a 'leaving prison mentoring' programme, to help young offenders during their transition from being released to returning to the community.

"A lot of focus is on getting young people into employment – building soft skills such as self-belief and motivation," says Richards. Referring to the Team programme, she adds: "People say things like 'it's the first time I've wanted to get out of bed for something' – it's always full of 'firsts' for them; the first time they've written a CV, or done work experience."



The charity helped Ferlondo Fullwood go to college to study catering after his elder brother was sentenced to life in prison

No matter where it turns in terms of marketing, research, insight and communications, the Prince's Trust comes up against the barrier of limited financial resources. "Research is so important to us, but it's always about balancing how important it is, with the costs that come with it," says Richards. "So, yes, we're always looking for opportunities to do more research, because it's not a luxury: it's a necessity and a luxury. Where possible, we have to work with partners who will work on a *pro bono* basis."

Richards is keen to point out that agencies that do work with it, *pro bono*, get a lot out of the partnership – so the impact goes beyond the obvious advantage for the Trust.

"It's not just about giving free stuff, it's about the value they can get from working with us," she says. "The partners we work with – whether in the fundraising team, where they are giving us donations, or on the *pro bono* side, where they're giving a gift in kind – they get inspiration, employee engagement, and a sense of pride. The brand is a strong one to be associated with."

Perhaps just as crucially, the charity works to ensure the voices of young people are heard in the wider area of policy-making and public affairs; this is especially important for a group that can all too easily fall under the radar, and which rarely uses its vote to express its opinion.

"So often they feel they're not heard, and we can facilitate that – so as well as helping people get into employment and turn their lives around, we can also help them get their views heard with government," says Richards. ■



Ant and Dec hosted the charity's awards ceremony

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BACK IN THE DAY

FROM QR-CODE SURVEYS AND GAMIFICATION, TO SKYPE CALLS REDUCING THE NEED FOR TRAVEL, MUCH IN THE RESEARCH LANDSCAPE HAS CHANGED OVER THE PAST 10 YEARS, AS CHIME INSIGHT & ENGAGEMENT'S **CRISPIN BEALE** EXPLAINS

During a recent discussion about geolocation beacons and omni-channel marketing opportunities, I was struck by the huge changes that have taken place in the industry in recent years, not only in my own work – which is to be expected, having moved from client-side to agency-side – but also in the way that brands use research.

In the words of the late American scientist Carl Sagan: “You have to know the past to understand the present.” With this in mind, I reflected on the elements of change I have seen over the past 10 years, drawing on some of the four ‘Ps’ of marketing as a guide.

PRODUCT

Research is no longer limited to traditional methodologies, such as face-to-face interviews and paper-based surveys. In this age of technological evolution, research takes place across an ever-growing range of smart devices. The pace of technology is increasing and brands expect faster turnaround times, real-time data, and the ability to access information across the globe.

Ten years ago, online research was seen as the latest and greatest, and – as predicted – has transformed research as we know it. However, there are downsides to the fast turnarounds and broad samples on offer – (see Simon Carter’s comments in box, opposite). While there will always be new and innovative approaches to capturing



HUMAN TOUCH STILL NEEDED

Simon Carter, marketing director, UK and Ireland, Fujitsu

A decade ago, I worked mainly with UK agencies, but now global partnerships are possible, irrespective of country base. Similarly, where regional teams previously worked on the ground across the world, they are now able to work virtually – from anywhere – and hours of operation have become 24/7 to accommodate time-zone differences.

Whereas, 10 years ago, the focus was on sampling, ‘big data’ – and the ability to mine information – now means the whole universe can be accessed, which is an exciting proposition indeed. However, the result of this plethora of information has – I believe – caused a downturn in marketing skills.

For example, email is ‘free’ – versus paper direct mail, which needs stamps – and this has made marketers lazy. They now send to thousands of addresses without worrying whether the recipient is alive or dead – arguing that it is cheaper to waste the effort, than spend time cleaning and segmenting the data – which results in recipients being less open to this channel of communication.

In this fast-moving world, it is also harder to undertake research that generates real nuggets of insight, as customers have become increasingly fickle towards brands, or suspicious of marketing and research activity. With lower levels of brand loyalty, opinions change quickly,

and researchers need to find ways to adapt.

Having moved from a business-to-consumer (B2C) role to a business-to-business (B2B) one, I have found significant differences in research requirements between the two. For B2C, the best way to gain trends and satisfaction insight is via focus groups and street interviews, while B2B research is used, mainly, to develop thought-leadership positioning – and 80% of it is undertaken online, which is almost the only way to achieve a response.

So have things improved? On balance, I would say ‘yes’, but technology should never be a replacement for human intelligence and rigour. ■

consumer opinion, nothing can replace the nuances and insights that can be gained from speaking to a respondent in person.

PRICE

Research used to be the exclusive domain of blue chip multinationals, but technology has made it more accessible to SMEs, using highly targeted samples over short timeframes. Budgets are tighter on all sides (see Danny Russell’s comments in box, p58). Large research agencies still dominate the industry, as they did 10 years ago, but – at the other end of the spectrum – there has been an increase in small-scale consultancies and boutique agencies, catering for SMEs.

PLACE

We operate in a truly global marketplace. When I was head of insight at the Post Office, 10 years ago, weekly trips to France and Italy – to view fieldwork – were inevitable. Now, I can deliver insights and updates to clients via daily and weekly Skype calls – it’s no longer necessary to be physically present to conduct business, or oversee projects.

PROMOTION

New ideas are constantly being sought to engage the consumer. Where, previously, video was considered innovative, it’s now the norm. From podcasts and interactive websites to gamification, QR-code surveys and live audience response, the trick is to keep it new and interesting. Tables and graphs cannot be replaced for reporting survey findings, but brands are finding infographics and interactive visuals more effective for presenting results. The next big thing is the Internet of Everything, and we are already looking at ways in which smart devices in the home – such as wearables – can be used for research purposes.

So, while there have been dramatic changes in the research industry in the past decade – some positive, some less so – what is clear is that there is plenty of change still to come. Understanding what works and what doesn’t is the first step in adapting to an ever-evolving, ever-more competitive landscape.



SPEED IS OF THE ESSENCE

Danny Russell, general manager, business intelligence, Telefonica UK

Technological advances have made the pace of everything much faster. Gone are the days of dial-up broadband; now there are complaints if a page doesn't load within three seconds. As a result, people have high expectations of delivery time frames. In market research terms, this means more traditional methodologies have fallen out of favour with some stakeholders.

Setting up a traditional research group takes time, and it can be hard to justify when a panel exists, or a virtual group can be set up online within hours.

Similarly, waiting a week or more for a debrief meeting now

seems cumbersome when stakeholders can easily compromise on the purity of the research for the sake of quick decision-making.

The next major difference lies in the way brands use market research in the wake of the great data explosion.

Ten years ago, stakeholders would often start with a much smaller knowledge base, and then rely on market research to fill in the gaps. They would be happy to wait six months and allocate a considerable budget to the project, because the accuracy of the results formed the basis of major decisions.

Now, stakeholders have access to a plethora of data, which they can layer and analyse to create a knowledge base of 50-60% as a starting point.

This often means decisions are often already close to being made before research starts. When looking to research, stakeholders often seek contextual insight to reinforce and refine their decision-making.

Greater collaboration with procurement departments is required. With technology now available that enables risk assessment, business continuity checks, and costs to be broken down by project, area

and methodology – all at the click of a mouse – the need to justify budgets is greater than ever.

Finally, data-rich, email-laden stakeholders can be harder to convince of the need for further insight.

When there was a smaller knowledge base, they would be more involved and keen to attend research debriefs, but that is often now no longer the case.

So we must work much harder on our communication to achieve cut through, and highlight the genuine value that research and insight brings to a business. ■

EVOLUTIONARY STEPS

INSIGHT TEAMS – BOTH WITHIN CLIENTS AND AGENCIES – REQUIRE THE RIGHT BALANCE OF CAPABILITIES TO BE ORGANISED AROUND CUSTOMER NEEDS, SAYS BRAND LEARNING'S **CRAIG SCOTT** AND **HAYLEY SPURLING**

The interesting thing about human evolutionary steps is that – contrary to popular perception – they don't happen over the course of thousands of years. They happen suddenly, as if Mother Nature has been considering improvements for a long time, ponders them, and then takes action. It is with this in mind that we were considering how insight teams need to be organised to deliver a coherent knowledge offering in today's world. Is a sudden and effective evolutionary step needed? If change is necessary in client-side teams, do agency teams also have to evolve, to support them more effectively?

Insight teams seem to be comprised of individuals with broadly the same set of skills, deployed on a brand or category – a bit like a football team that is made up solely of midfielders. Yet, as we all know, there have been increasing and consistent calls for us to be more like consultants, storytellers, visionaries, leaders, change-agents and creatives.

Interestingly, no one seems to be asking us to be better with data – so is it even possible for one individual to be good with data and have all the capabilities listed above? We don't think so, but we do believe our next evolutionary step is to develop a blend of these capabilities across teams.

Most sports teams are made up of people with the same core skills, but with specialist talents as well (defenders, midfielders, strikers). Can insight teams evolve in the same way?

Brand Learning recently re-examined the role of marketing in a highly dynamic and changing world and identified the need for four capabilities – the 4S Marketers – that are as relevant to insight as they are to marketing:

- 1 Scientists – work with latest techniques and sources to collect knowledge.**
- 2 Strategists – shape strategies focused on the customer experience.**
- 3 Story builders – create stories to engage internal and external customers.**
- 4 Socialisers – spread the stories and evolve them, as customers engage and results are measured.**

This does not mean that all insight professionals fall into the 'scientists' group, but there is a natural leaning toward that capability. In truth, individuals typically have a leading strength, and that strength is enhanced with additional skills, such as strategist and story building. While socialisers aren't usually critical for insight teams, the rise in real-time data – as campaigns are implemented – means they often need insight teams' support.

The implication for insight leaders is that they need to ensure their whole team covers these four key capabilities, in a balanced and blended way.

For agencies, the opportunity is to offer activities that support the delivery of all these capabilities, and not to focus solely on knowledge delivery. For example, there is no better source of story-building content than one-to-one time with customers in their world. Agencies can organise this – bring an insight team together to workshop, share and rehearse their stories, so that they go back into the business with engaging soundbites, and examples that bring knowledge to life in compelling and meaningful ways.



We have worked with many businesses to consider how they need to be designed so they are organised around their customers. It has led to new roles – with new titles and profiles – being developed to align the teams to be more relevant and effective.

Those businesses are recognising the need for an evolutionary step. If you were to consider your own professional evolutionary step, which step would you take? ■

Craig Scott is marketing capability director, and **Hayley Spurling** insight thought leader, at capability consultancy Brand Learning.

WHAT YOUR CLOTHES SAY ABOUT YOU

ASKING QUESTIONS IS THE CORNERSTONE OF RESEARCH, BUT WHAT IF THE ANSWERS ARE DIFFICULT TO PUT INTO WORDS? WEARABLE SENSORS THAT 'EXTERNALISE' PHYSIOLOGICAL RESPONSES COULD HELP ACCESS THESE INSIGHTS, WRITES **BRONWEN MORGAN**



How does that make you feel? is a question that strikes fear into many. It's a difficult one to approach when exploring even the most emotive subjects, but when posed in a market research setting it can leave respondents clutching at straws. An ad may excite or disgust, but how accurately can this response be self-recognised and reported? The latest wave of wearable technology may hold the key to accessing this insight: forget wristbands and chest straps, clothing and bedding are now getting the sensor treatment.

BLANKET RESPONSE

British Airways recently tested a 'happiness blanket', designed to measure the satisfaction of its passengers while allowing them to rest undisturbed. The blanket works through neurosensors that measure relaxation and stress levels, then transmit the data to the blanket by Bluetooth. This is then displayed via fibre-optic LEDs woven into the wool blanket: if the passenger is stressed or anxious, the LEDs glow red. When they are relaxed and happy, the lights on the blanket turn blue.

According to British Airways, this information can help the airline to understand how its customers' sleep and relaxation is affected by everything on board: from the amount of light in the cabin to when

they eat, the in-flight entertainment they watch and their seat position.

MOOD DRESSING

Along similar lines is Sensoree, a San Francisco-based company that has developed a mood sweater, which "interprets emotion and displays excitement levels instantly with an illuminated collar". The technology 'reads' the body via biosensors measuring heart rate, brain waves and sweat, as well as heptic – tactile – indicators. It was originally developed for people with sensory processing disorder – a condition that ranges from ADHD to autism – to help with "self-feedback and communication". But Sensoree's founder and future concept designer, Kristin Neidlinger, believes there are many more uses for the technology.

"It has all sorts of applications," says Neidlinger. "Paediatricians are really interested in it for children who can't speak yet, and who also find the regular sensors uncomfortable. There's also interest from those who work with the elderly, in convalescent homes."

Does she think the technology could be used in market research?

"Definitely. I think it's a whole new level because I want it [the technology] to bypass your brain and access your emotional state. Sometimes people don't really know how they're feeling. I also think group dynamics would be fascinating. I can't wait to have a whole

room of these artefacts interacting."

There is also scope, says Neidlinger, for the technology to incorporate a memory capability, so that emotional reactions could be downloaded and – in theory – mapped against the stimulus being measured.

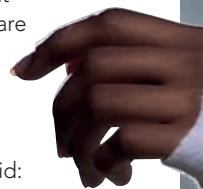
WARY OF WEARABLES

But there are some who have reservations about using these types of products in market research. Technology consultant Christian Super, whose background is in applying technology to the research industry, believes that there are opportunities for wearables to offer useful insights – particularly in areas such as media monitoring, virtual shopping and health research – but that there are a number of common traps that need to be avoided if they are truly to add value to the research process.

"What concerns me is that some of the stuff starts to border on – what you might call – pop market research, like pop psychology. While it's really cool that BA has a blanket that changes colours, my question would be: 'Is that validated using neuroscience, so that we understand truly what emotions are being measured?'," says Super.

Neidlinger has also hinted at the potential for misinterpretation: "I've been wearing it [the sweater] and talking to somebody, and they've said: 'Well you're not interested in what I'm saying because you're still blue; you're still calm and relaxed.' And I'll be like, 'no I'm focused. I'm actually really attentive and listening to you.' There are lots of interpretations."

Super's other concern is consistency, and whether results from different items are comparable. "If the blanket is measuring emotions in one way, and then over here you've got somebody making a dress, and they're measuring emotions, are they measuring them the same way?" ■





FOOD FOR THOUGHT

THE OPPORTUNITIES TO EAT MORE FOOD, MORE OFTEN, ARE GREATER THAN EVER BEFORE. BUT A NEW ACADEMIC PAPER AND BOOK SHOW THAT TACTICS CAN BE EMPLOYED TO AVOID MINDLESS OVEREATING. BY **JANE BAINBRIDGE**

Consuming food used to be a simple matter of sustenance and survival, but now it is political and big business. As nations across the world – especially the developed world, led by the US – grapple with an obesity epidemic, eating has become the focus of attention for everyone from governments to the media, and from food manufacturers to health professionals.

As more people consume more calories than they need, and so much of the over-eating debate focus has been on the type and quantity of food consumed, researchers are now pointing to another factor that must be considered – the importance of environment. By ‘environment’ they mean everything from who you’re eating with to the size of the plates and cups used.

Pierre Chandon, L’Oréal chaired professor of marketing – innovation and creativity, and director, INSEAD Social Science Research Centre, says: “If you ask people why they overeat, most say it is hunger or emotions. They overestimate the impact of hunger and underestimate the impact of the environment. All the things we take as cues to know if it’s appropriate to eat, those norms – social or personal – influence what we eat more than we realise.”

Mindless overeating is taking place within a context where food is more affordable, attractive and available than ever before. “The solution is to change our habits, so we can deal with an environment like that,” says Chandon.

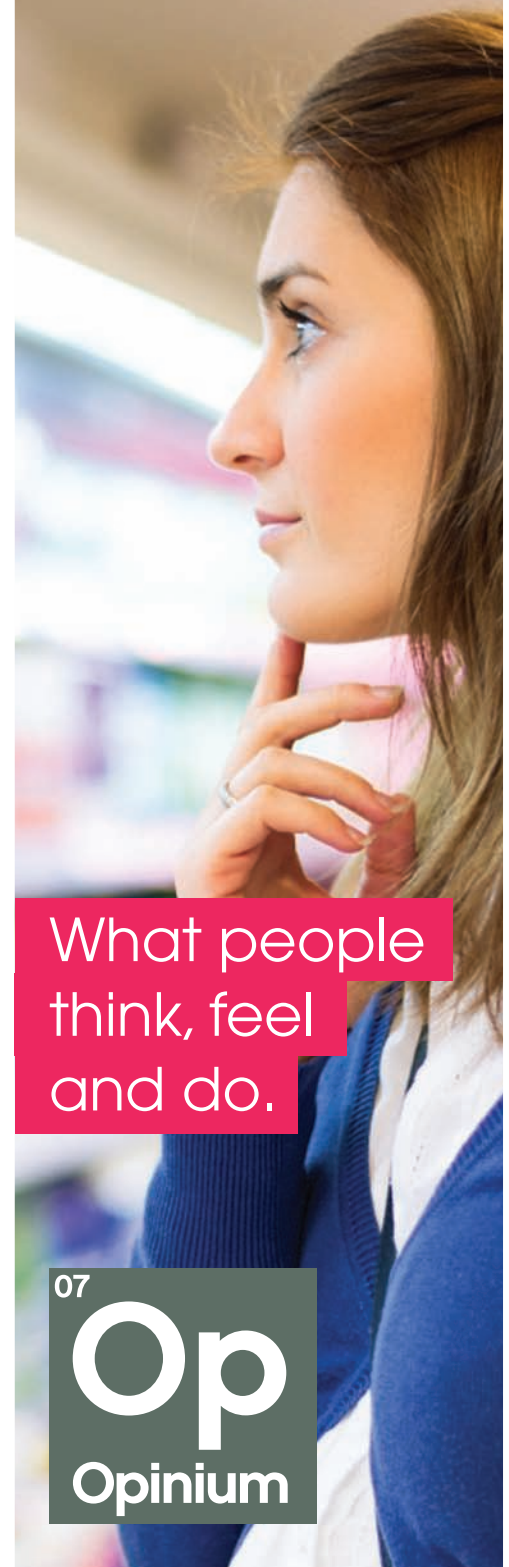
He points to changes in society that make it harder for us to monitor our hunger and consumption – in particular, the number of eating occasions, larger portion sizes, and what he calls the “health halo”, where foods claim credentials such as ‘low fat’ and ‘light’.

Many of the social norms that used to limit our consumption – such as not eating on the move – have been abandoned. “It’s the

omnivore’s dilemma – there is so much opportunity to eat all the time. It’s almost impossible to go somewhere without sipping something. In some countries – such as Japan, which still has the lowest obesity rates in the world – it’s taboo to walk and eat,” says Chandon.

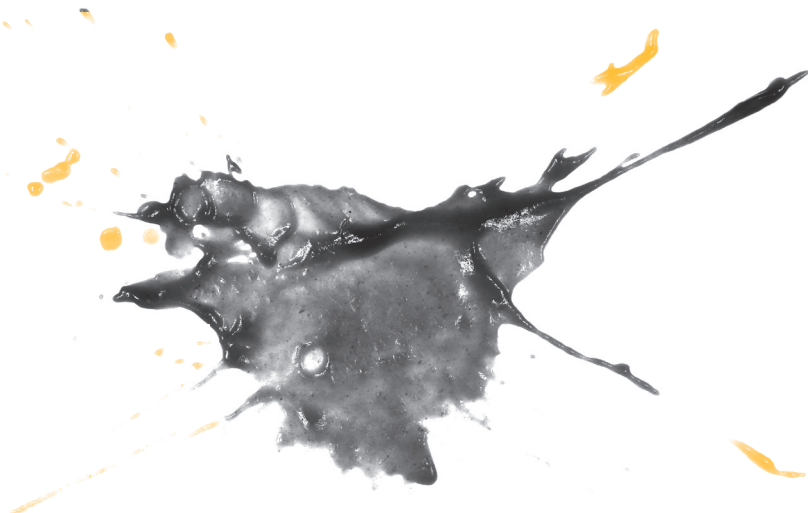


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What people
think, feel
and do.

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Part of the problem, he says, is that humans can't detect small changes in what we eat – either in terms of too much food or too little – and this effect gets worse the larger the quantity.

"An extra 100 calories per day means 3kg in three years, more or less – and 100 calories is nothing," says Chandon. "Our body is so good and efficient that even a slight difference can make a big difference."

Chandon collaborated on a recent paper with Brian Wansink – the John Dyson professor of marketing, and the director of the Food and Brand Lab at Cornell University, in Ithaca, NY. Wansink has published several books on the subject of overeating, his most recent being *Slim by Design: Mindless Eating Solutions For Everyday Life*, with the corresponding website slimbydesign.org.

While so much of the obesity crisis has focused on policy changes, both men believe it is possible to meet the twin objectives of getting people to eat better and of companies making profits.

"There are many win-win solutions. When I first met Pierre, in 1995, I was working on pack-size research, and I came up with the idea of a 100-calorie pack," says Wansink. "I presented that to companies. Initially they said it was crazy, because it wasn't part of their mindset. Nabisco finally called me back and – once it was convinced – 100-calorie packs came out within three years."

"Our goal," he adds, "is to make it a consumer movement that tells companies, 'there are easy things you can do to make more money, and I can be happy'. It doesn't take laws – it takes enough consumers saying what they want."

Chandon says there is an assumption that the driver for food companies is to sell more food, but that this is wrong – their aim is to make money. "Typically, the easiest way to make money is with food high in salt, sugar and fat, because that's what people like – and highly processed food is cheap. But if you find a way to sell less for more – [such as to] downsize portion size – how do you do it in a way that's less conspicuous? One simple trick is to elongate [the pack]. You can reduce the size by 25%, but elongate and people won't notice; you still tell people the right amount, but that's all it needs, because people select mindlessly."

Wansink argues that – as decisions around eating are affected by so many factors – people can focus on some specific, do-able, scalable solutions that can help them to avoid mindless eating.

"There are basically five areas in our food radius where we make decisions about what we eat: our home; two or three restaurants we go to most frequently; where we shop most often; where we work; and where our kids go to school," he claims.

"By coming up with specific things that can be done in these areas, all of a sudden that's do-able."

The article *Slim by design: Redirecting the accidental drivers of mindless overeating* is published in the *Journal of Consumer Psychology*. ■

IT TAKES TWO TO MAKE A DECISION

WE DON'T ALWAYS MAKE DECISIONS IN ISOLATION; PEOPLE ARE INFLUENCED BY THOSE THEY LOVE, WHICH HAS REPERCUSSIONS WHEN RESEARCHING HOW CHOICES ARE MADE. BY **JANE BAINBRIDGE**

To make a decision – even on an individual level – can be a complicated process. But what about all those decisions and choices that are made in relationships? How much do the opinions and preferences of a partner affect an individual's choice: should I buy that dress; do I like it; can I afford it; will my husband like it; can I wear it going out with him?

Several papers have been written on the role of relationships on consumer choices, and – in a recent theoretical one – Margaret Gorlin, from Yale University, pointed to the two stages that need to be considered: the decision stage and the consumption stage.

Gorlin believes the type and degree of influence that a partner's preferences have on the decision-maker's choice will depend on how much – at each of the two stages – decisions are made jointly.

"We proposed four different cases to consider: making decisions together for one outcome (consume together); making decisions together, but consuming separately; making decisions separately, but consuming together; and making decisions separately and consuming separately," says Gorlin.

The degree to which a partner affects a decision depends on the situation, and the choice of product involved.

"Marketers could do more to take account of the idea that people are often not just guided by their own preferences and attitudes, but by relationship partners – especially domains that involve self-control, such as exercise and healthy eating," Gorlin says.

So why is self-control such a factor in joint decision-making? "In most cases, one relationship partner has higher-order goals and aspirations that apply to both partners. So one might hold a strong goal to eat more healthily, and hold it for the other partner too – and influence them in that way," she says.

Gorlin says that – although there's no empirical evidence for this – it is consistent with other research on health behaviours.

As relationships evolve and develop, the way in which partners affect decision-making can also change. "Over time, the influence might be more unconscious. So, when one partner is making decisions, the other will act in accordance with those goals – they might start to hold those attitudes as well, unconsciously," she says.

This is an area ripe for further research, but Gorlin concedes such research is very difficult – not least because people have a tendency to overestimate the extent to which others share their views. "They're most likely to choose something they'd prefer, while thinking it's also the other's preference," she says.

"It's a cognitive bias – people are wired to think others are more like them, especially those near to them – but also a motivational bias. You may know your partner would prefer something different, but you really want to get what you want."

The article *Bridging the gap between joint and individual decisions: Deconstructing preferences in relationships* is published in the *Journal of Consumer Psychology*. ■





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Disruption comes to the financial services market

A NEW OPPORTUNITY FOR INVESTORS AND SMEs HAS BEEN CREATED BY PEER-TO-PEER LENDING MARKETPLACE, FUNDING CIRCLE. INTERVIEW BY JANE BAINBRIDGE

While the internet and the rise of digital media have caused disruption in many industries in recent years, the world of financial services remained untouched by this new dawn for longer. However, when peer-to-peer lending marketplace Funding Circle was founded by Samir Desai (CEO), James Meekings (chief commercial officer) and Andrew Mullinger (global head of credit), four years ago, their intention was to change all of that. *Impact* talked to Desai about disruption, growth – and its work with Santander.

***Impact:* What made you decide to set up Funding Circle in the first place?**

Desai: We started the business in 2010. We looked at the UK small business market and realised 90% of lending to businesses was controlled by five major high street banks. At the same time, investors were earning low returns with their money in a savings account. We thought there was a way to bring these two groups together via the internet.

***Impact:* We have seen disruption from the internet and social media in many industry sectors, but it seems to be more limited in financial services; why do you think this is?**

Desai: Marketplaces such as Funding Circle are redesigning the financial services landscape for consumers and businesses.

We're seeing the same disruption and innovation in this sector that we have seen in the music, telephony and travel sectors in recent years. Skype, Amazon, and a host of new businesses, have altered the landscape completely in their industries, providing increased competition, better service, and lower costs for consumers.

Financial services has been one of the last industries to be disrupted by the internet. But now – as people increasingly don't want to use physical branches of a bank, but prefer to complete activities online – models such as ours have proved to be successful.


It's just a better process for businesses and investors.

KEY PERFORMANCE INDICATORS

REVENUE FOR THE SIX MONTHS ENDING 30 JUNE, UNLESS OTHERWISE STATED

ComScore	\$156.9m ▲ 13.1%
Forrester	\$156m ▲ 3.9%
Gartner	\$996.5m ▲ 13%
GfK	€697.9 ▼ 4.2%
IMS Health	\$1.3bn ▲ 5.7%
Ipsos	€756m ▼ 5.9%
Nielsen	\$3.1bn ▲ 14%
Reentrak	\$22.3m ▲ 34%*
WPP (data investment management)	€5.5bn ▲ 2.7%

*three months ending 30 June



For example, 50% of Funding Circle businesses apply for a business loan outside the traditional 9am-5pm opening hours of a bank.

Impact: Do you think a business such as Funding Circle could have established itself without the global economic crash? Did it need a shake-up like that for someone such as you to get a foothold?

Desai: The economic crisis certainly played a part in the rapid growth of peer-to-peer lending, but the industry would have succeeded anyway. Because marketplaces such as ours offer a fundamentally better way for businesses to access

finance. It is a fairer, faster, and more efficient way to borrow money.

Impact: How much are you investing in businesses currently, and who are your main investors?

Desai: On average, our investors are now lending more than £20m per month to small businesses in the UK. Investors include: 30,000 individuals; the British government through the British Business Bank; eight local councils; financial organisations; and Huddersfield University. More than 5,500 businesses have successfully gained access to finance from this wide investor base.

Impact: You have been established as a peer-to-peer loans company to small and medium-size enterprises (SMEs), but do you see your business expanding out of this area – and, if so, into what?

Desai: Lending to businesses is our heartland. We want to help businesses access the finance they need, and we will always look at new areas that will enable us to do that successfully.

Impact: To be a viable player in financial services, do you have to reach a certain scale/size? What do you think that size is – and have you got there/when will you reach that point?

Desai: There is more than £7.5bn per month lent to small businesses in the UK – and, globally, this figure is much higher. There is still a way to go until we are a

significant part of this market, but we do believe that – in time – we can account for 10-20% of all small business lending in the UK. Independent research by Nesta indicates that lending through Funding Circle will reach £12bn annually within the next decade.

Impact: Your tie-up with Santander is interesting – a melding of old-world financial services and new – but does that weaken the disruptive model?

Desai: This partnership is a good example of how retail banks and alternative finance providers can work collaboratively to deliver an efficient, transparent and honest service for customers. The referral arrangement will result in Santander proactively referring small business customers who are looking for a loan to Funding Circle, where we are better placed to help. These referrals will take place in Santander's branches, on its website, and in letters to customers. ■

Role of research in brand valuation

ROBUST RESEARCH IS VITAL FOR MEASURING BRAND VALUE AND HELPING INVESTMENT DECISION-MAKING, SAYS **DAVID HAIGH**



In the future, market research departments will not report to the chief marketing officer but to the chief financial, strategy or operations officer. Attitudinal research and behavioural analysis are now far too important for strategic decision-making purposes to be treated as ancillary services to the marketing function. Market research and customer insight budgets

will no longer be rounding differences in the marketing budget, subject to arbitrary cuts to fund marketing communications. In future, they will be a major business investment, fundamental to financial forecasting, of both revenues and costs.

Strategy consulting firms are already significant buyers of qualitative and quantitative research. Investment analysts are also buying into syndicated and proprietary research to make better investment decisions. As big data has matured, firms like Tesco have invested huge sums in analysing both attitudinal and behavioural data, for short, medium and long-term planning purposes. Online companies like Google, Facebook, Amazon and Spotify analyse customer demographics and behaviour on a continuous basis, recommending new products and services. This is used to both predict and stimulate demand.

In the context of business and brand valuation, market research is the key determinant of an insightful model. Scenario analysis, which hypothesises the value impact of particular brand or marketing actions, depends on high quality research.

ISO 10668, the global standard on brand valuation, which

was released in 2010, set out, for the first time, global rules for determining best practice brand valuations. ISO 10668 required the valuer to conduct three analyses: legal analysis to clarify and define the subject asset; behavioural analysis to predict likely market size, growth, pricing and market shares; and financial modelling. In other words, without robust attitudinal and behavioural analysis, flowing from high-quality research, it is not possible to produce an ISO-compliant brand valuation. The ISO global brand valuation committee was recently reconstituted and meets for the first time in September, hosted by the Chinese standard-setting organisation in Beijing.

One of the key areas of study is the measurement of brand equity. As China moves from a low-cost, manufacturing economy to a high-value, IP-rich economy, its interest in brand measurement and valuation is rapidly growing. Chinese companies are developing their own brands like Lenovo, Haier, Huawei and Alibaba. They are also buying into old world brands such as Volvo, Rover, MG, Weetabix and PizzaExpress. In particular, the new phase of ISO work will focus on the use of market research to more accurately value brands.

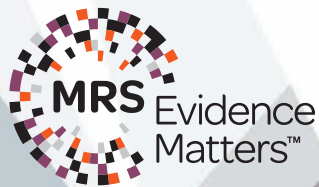
Brand Finance is one of a small number of firms certified to produce ISO-compliant brand valuations and we are chairing the UK delegation to Beijing. Financial valuation models and constructs are already well defined, transparent and recognised. The area which needs work is the area of research feeding into the financial models.

What are the right qualitative and quantitative research techniques to credibly predict consumer awareness, perceptions, attitudes and behaviour? What is likely to happen to consumer acquisition and lapse rates, price premium and recommendation, and how should we factor these key value drivers into the five-year forecasts typically used when valuing both businesses and brands?

For example, when valuing telecoms brands, where average 'churn' rates might be 20%, how can we reliably identify the brand which has a 15% or a 25% churn rate, because one has strong brand equity, while the other does not? How can we identify which of the three brands commands a sustainable price premium? Various market research techniques are vital when answering these questions. Arriving at the right key value driver assumptions is critical to producing an accurate and reliable valuation. Robust research is hugely valuable for both internal and external due diligence and investment decision-making.

Our brand equity division regularly commissions trade-off research, conjoint and attribute research to understand drivers of demand and to explain key value drivers for our financial models. Given the money at stake in getting these valuation assumptions right or wrong, it is inevitable that financial people will be a growing audience for the market research industry. Understanding their language and mindset is highly recommended. ■

David Haigh is CEO of Brand Finance



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EARLY ADOPTER

AS A DIGITAL STRATEGIST, **TIFFANY ST JAMES** HAS BEEN AT THE FOREFRONT OF DIGITAL ENGAGEMENT POLICY WITHIN THE UK GOVERNMENT AND BUSINESSES. SHE TALKS TO *JANE BAINBRIDGE* ABOUT CAREER PLANS, WORLD FIRSTS AND WHY THERE'S NO DARK SIDE TO SOCIAL MEDIA

Reading Tiffany St James' CV makes your head spin. And when the spinning stops, the feeling of inadequacy sets in. For among her numerous roles leading the digital agenda in government and business are not one, but two, firsts.

She was the first social media head of any government in the world, when she became head of public participation for the Cabinet Office in 2009 and the first communications director of directgov.

"Being the first director of comms for directgov doesn't mean so much now because gov.uk has replaced it but, at the time, we ran the largest web rationalisation programme in the world. We pulled down 90% of government websites over five years and repopulated all the information with one tone of voice and one website on directgov.

"Everyone in the world was interested in what we were doing. I spoke to many other governments about that programme of activity. No-one else had a large enough digital estate to put that programme in place," she explains.

But for all her success and pioneering spirit, St James is quite pragmatic about her achievements, describing her role as the "fixtures and fittings".

"In government, my job was to make career civil servants look brilliant, and do programmes of great delivery but always behind the scenes – never with a public profile. I left government in 2010 and spoke at a conference in Geneva; afterwards someone grabbed me



and said 'you've been the talk of the government here for two years'. I had absolutely no idea," she says.

St James thinks the UK is often under the international spotlight because of the sheer level of digital activity here and our entrepreneurial infrastructure. "The things we do in the UK ripple around the world; all eyes and attention are on the digital industry in the UK, and we are ahead of many countries."

What's interesting about St James' roles as digital strategist is that while government often has a reputation for being slow and bureaucratic, her CV suggests the opposite. So I wonder who she thinks instigates the most change – government or business?

"Both in different instances," she says. "When we launched data.gov.uk we set it up in three weeks. I do not know a private company that would have set it up quicker; it was an enormous endeavour. And, for things like civil contingency – I was part of the team for social listening for swine flu – the government always had a pandemic flu strategy, but it didn't know what strain. To be able to operate so swiftly – use social listening, change digital communications, get-together at Cobra (the government's national emergencies committee) level – you've got to be agile. The government is brilliant when it has a deadline and civic contingency has structures in place to do that.

"On the other hand, when I worked in a media agency to build a social listening team, they just said yes. In government I'd have had to write a business case, have it signed in triplicate, present it to ministers..."



So, with experience from both public and private sector, what are her secrets for achieving engagement and behavioural change in organisations?

"Understanding the personal, professional, political agenda for decision-makers – what's the most important thing to them? There are all sorts of reasons for getting people engaged in a programme – learn what the importance of the programme is for them and address that succinctly. Do stakeholder mapping early in engagement, as people have different needs. You have to inspire people and articulate the vision – I imagine that this time next year, this and this will happen. People forget the storytelling in projects of this type. Articulate the benefits to them and the business. In government it's public money – we had to underpin everything; it had to be evidence-based.

"I don't think enough people concentrate on whether you have identified what behaviour needs to change – by whom, to what, and to what effect?" she adds.

Working with politicians in particular, she says, ensures brevity and clarity. "People don't give credit to how smart politicians are, and how hard they work. They're very

busy and very smart; they have an enormous amount of information to process. So you have to be very clear what you're asking for."

St James has been fascinated at each stage of the digital revolution; desperate for the internet to become more sophisticated in its nascent years. And, being something of a pioneer in this space, has meant she's practically making up the rules with each job she's done; as she says, there's "never been a roadmap".

One consequence has been the lack of any master plan in terms of

her career path. "My job didn't exist five years ago, so it's hard to make a career plan when you're working in an industry that moves faster than most others. But what excites me is raising people's horizons: collaborate, learn really fast and then share that cohesively. That's been something I've always done," she says.

And now – finally – she does have a 10-year plan, which she's two years into. "There are three themes: work-life balance, financial planning and helping the UK become a digital powerhouse." Because – as career goals go – St James' are far from humble: first it was about making government brilliant digitally, and now it's about doing the same for big business in the UK. To that end, she's set up a consultancy – Transmute – to help large firms use digital and social media internally.

So, as a digital evangelist, does she see any dark side to an online socially-networked world? I immediately receive a kind, but clear ticking-off for asking this question. "There's no dark side to social media, but there's a dark side to people. It's not the medium, it's how people use it; some people are manipulative and trolls."

However, she does concede that there was a need for some things to change. "The channels used to say: 'don't blame us, we're just the channel' and now they're starting to interact and have a bit of responsibility because of public pressure."

And this has repercussions for everyone in this space. "Authenticity will rule. Organisations that are issuing data in a way that people haven't given them permission to, or are manipulating data to tell a different story, are going to be called to account. Because, with open data, many more people can look at information and can really see who's not being authentic with it, and customer and citizen pressure will only grow," she says. ■

THE JOB MARKET A MILLENNIAL OPPORTUNITY

The research and insight industries must become more proactive and guide millennials into research careers, says **Sinead Hasson**



As our burgeoning economy forges ahead, demand for research services is growing and specialist firms are hiring again. Versatile and adaptable employees are needed but – as ever – sourcing the best talent remains a perennial struggle.

It is a worn-out cliché to think of the millennials (today's generation of majority-twenty-somethings) as inexperienced and apathetic. A far more useful portrayal would be to consider these individuals as the first generation to be born in the digital age and, as a result, in comfortable possession of analytical, adoptive and digital skills that are increasingly becoming essential components of our industry's work.

Digital platforms are second-nature. Social media awareness and use is greater and more finely tuned than for any of the generations that came before them. Expressing opinions and engaging with brands online is – and always has been – run-of-the-mill, and some have refined their storytelling skills through blogging.

Through their day-to-day engagement online, many have already been exposed to digital research terminology and methods. Most will have used SurveyMonkey and all, I expect, will have either read or posted reviews on sites like Amazon. Many will have tuned into TV programmes like *8 Out of 10 Cats* or the BBC's *Britain Unzipped*. Surely, then, the big question is not one of suitability, or indeed of talent potential; it's one of visibility. How many millennials have identified research as a viable career? Not enough, it seems.

“ It is a worn-out cliché to think of the millennials as inexperienced and apathetic ”

Opportunities to learn and positions offering CSR, personal development, career progression and training have proved popular with many. One poll revealed that prestigious online firms like Google, Apple, Facebook and Microsoft rank among their ideal employers. What may be surprising is that big salaries are often less of a priority than the creativity, innovation and values of a potential future workplace. This poses both an opportunity and a problem for the research industry; it is certainly creative and innovative, but this needs to be better conveyed to become a front-of-mind career.

Research is often misrepresented by the media and characterised as easy or trivial so we need to go direct to the talent. A channel needs to be set up to guide potential researchers into the industry strategically, placing emphasis on the varied opportunities, chances for personal growth and creativity.

Insight agencies are crying out for those with a head for maths and analytics. Think of the disciplines that foster these skills: science, engineering and economics for starters, and that's just for quant. Other skills born from English, history, marketing, and a wide range of social sciences, are all equally in demand in qualitative posts.

What's to be done? There is little chance of changing how the media represents our industry, I suspect. So it's up to us. Proactivity is the order of the day. Many promising school-leavers are mopped up by the grad schemes of major global players, often sweetened by the promise of subsidised university fees and a job at the other end. Such tactics may be beyond the scope of most research firms but, nonetheless, I don't hear of many attending university job fairs, for example, or holding graduate open days in conjunction with a university faculty or sixth-form college.

Every June, a glut of gifted could-be-researchers enters the job market, but attempts to engage them then may already be too late. We must not wait around for the best talent to come to us. If we want the best millennials to join the research sector, we need to go out and get them.

Sinead Hasson (@Sineadh) is founder and managing director of recruitment consultancy **Hasson Associates**.



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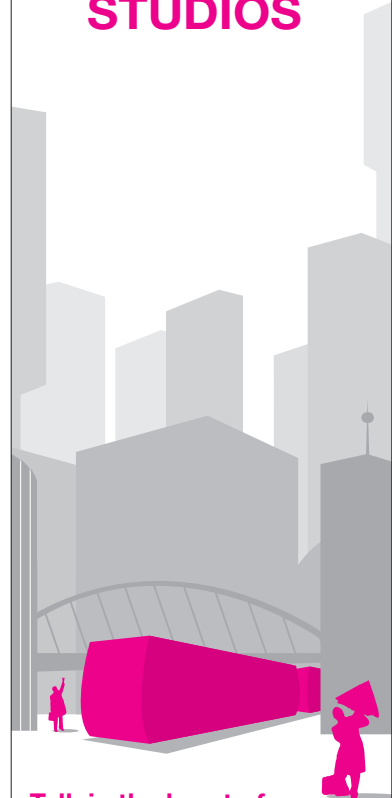
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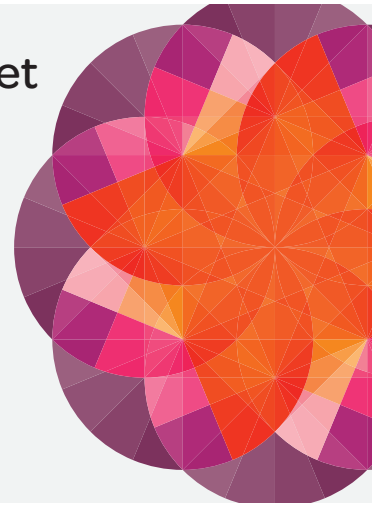
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A QUESTION OF DATA

BIG DATA HAS RESULTED IN NUMEROUS DATA PROTECTION ISSUES, BUT RESEARCHERS CAN MANAGE THESE MOST EFFECTIVELY BY ASKING SOME HONEST QUESTIONS OF THEMSELVES BEFORE EMBARKING ON A NEW PROJECT, SAYS **BARRY RYAN**



Barry Ryan is director of the MRS policy unit

In this, my last Legal Focus column, I thought I would reflect on one of the recurring themes of my nine years in working with – and advising researchers on – data protection issues.

With every new development in that period – from the mass migration of data collection to online, from telephone and face to face, to the advent of social media research, and the apparently inevitable triumph of big data – the first reaction of a cadre of commentators has been that the game has changed, and the rulebook must be rewritten, lest market researchers find themselves cast aside. One particularly vivid memory is the incredulous response I provoked when I suggested at a conference that researchers working with social media data may wish to comply with the Data Protection Act.

And yet each time, particularly as clients express concerns about compliance and reputational risk, the ‘old rules’ reassert themselves and – with some innovative thinking – can be applied to new techniques and technologies.

This is not unique to the research sector. Tech start-ups, particularly those who pride themselves on disruption and breaking things, have presented a challenge to data protection regulators over the past decade, but slowly, aided by the courts, they are meeting that challenge.

This year has seen a number of watchdogs, including the EU’s European Data Protection Supervisor (EDPS) and the UK’s Information Commissioner’s Office (ICO), publish

reports on how big data interacts with data protection. Researchers who read the ICO report, in particular, will recognise many familiar themes: consent; data minimisation; clarity of purpose; and anonymisation. As Steve Wood, the ICO’s head of policy delivery, said at the launch of the report: “Big data can work within the established data protection principles. The basic data protection principles already established in UK and EU law are flexible enough to cover big data. Applying those principles involves asking all the questions that anyone undertaking big data ought to be asking. Big data is not a game that is played by different rules. The principles are still fit for purpose but organisations need to innovate when applying them.”

At MRS, at least during my tenure, we have tried to be the regulator who likes to say yes. We have developed a code that is flexible and pragmatic, recognising that researchers are often asked to apply their skills in new areas. In return, we ask our members to apply their independent professional judgement before embarking on a new project.

HERE ARE FOUR QUESTIONS YOU SHOULD BE ASKING:

Do I have a clear plan of what data I need, and what it will be used for?

In order to be lawful, you need to ensure that the data you collect and/or use is relevant, and not excessive, for the particular purposes you have in mind. This has always been a feature of questionnaire design but, in the case of big data, it means that you must have a specific problem you are



seeking to solve, or a hypothesis you are seeking to test. Simply running the numbers (at least where those numbers relate to identifiable people) to see what falls out, violates the principles of data minimisation and purpose limitation.

Do I really need personal data?

I mean, *really*? Because if you don't, you can make a lot of legal problems go away, as the Data Protection Act no longer applies. Anonymisation, as I have discussed at length before, has its problems, but it remains a very useful tool in your compliance kit.

Would individuals be surprised to know what is happening to their data?

If the answer to this is yes, then you have a problem either with consent or with transparency more generally. If

you are collecting data from individuals, you need to inform them fully as to who you are, what information you are collecting about them, which other organisations will have access to the information, and the purposes for which it will be used. If you are receiving data from clients or other sources, you will need to review associated policies to ensure that your work will be compatible with what individuals have already been told. You should work with clients to ensure that they are being as transparent and open as possible with their customers to explain the purposes, implications and benefits of data processing. This also will add value to their data, allowing them to do more in the future.

How would this look in the Daily Mail?

Bad. Everything looks bad in the *Daily*

Mail. It is important to distinguish between what is merely legal and what is advisable. Given that research relies on voluntary participation, its reputation and integrity is essential to its continued success. People can live very long and happy lives without ever talking to a researcher, so when they do choose to participate, or allow their data to be used for research, it is important that they feel there is value to them and society in doing so.

Research has moved from a sector primarily defined by data collection, to one which is about data innovation. While the legal underpinnings appear unlikely to change, similarly innovative interpretations of the law are required for research to develop and prosper in the future. ■

GLOBAL ROUND-UP

EUROPE

Struggle over right to be forgotten continues

The EU sub-committee on home affairs, health and education of the UK House of Lords has published its second report for 2013-14, entitled *EU Data Protection Law: A 'Right to Be Forgotten'?*

The report concludes that the current law no longer reflects the reality that the global online sharing of personal data has become a way of life. It criticises the Costeja decision as constituting “bad law,” and asserts that – while large, established search engines may be able to bear the financial burden of implementing the right to be forgotten – smaller search engines are unlikely to have the resources to do so. The report goes on to say that it is “no longer reasonable or even possible ... to allow data subjects a right to remove links to data which are accurate and lawfully available,” and calls the right to be forgotten “misguided in principle and unworkable in practice”.

Meanwhile in Germany, Johannes Masing, a highly regarded judge of Germany's Constitutional Court, finds the decision to be well meant but dangerous. Writing on *Verfassungsblog*, while welcoming the confirmation that Google is subject to EU data protection law, he worries about the power granted to search engines to decide on the value of a deletion request, potentially upsetting the balance between the right to communication and the right to privacy.

<http://www.publications.parliament.uk/pa/ld201415/ldselect/ldecom/40/4002.htm>

<http://policyreview.info/articles/news/german-constitutional-judge-expresses-concerns-about-right-to-be-forgotten-decision/315>

UNITED STATES

CASRO set to tackle US rules on auto-dialling

In CASRO's new CXO blog, Abby Willman, director of government and public affairs, writes about the challenges presented to research by the Telephone Consumer Protection Act (TCPA), which is the primary federal regulatory framework placing restrictions on unsolicited calls. The TCPA was passed in 1991 and the Federal Communications Commission rules and regulations implementing the act came into effect in December 1992.

One primary feature of the law is that it prohibits, without consent, virtually all non-emergency calls or texts made with an automatic telephone dialling system (ATDS) to mobile phones.

At the time the law was passed there were approximately 10m mobile telephone subscriptions in the US compared to 100m residential main telephone lines. As Willman notes, by 2013, two in every five American homes had only mobile phones, with no fixed line subscription. As businesses struggle to apply a decades-old law in the face of growing mobile phone use, CASRO has committed to seek clarification on the application of the TCPA rules. <http://blog.casro.net/tcpa/>

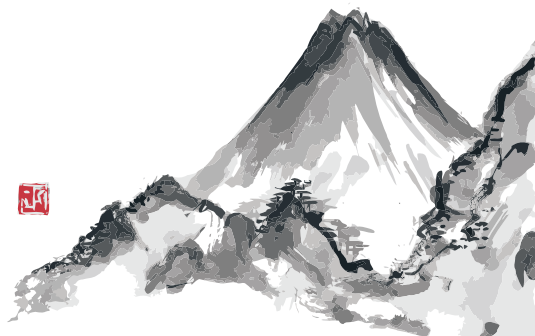
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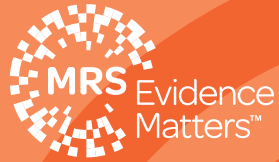
Briton found guilty of illegal data collection in Shanghai

In August, British citizen Peter Humphrey was sentenced to two-and-a-half years' imprisonment and fined approximately £20,000 for the illegal collection of personal data. Humphrey, who had run an investigation and consulting company in Shanghai since 2004, reportedly collected, purchased, or otherwise obtained personal information as part of compiling credit reports, which he sold to clients including multinational companies and law firms.

The case is a reminder that market and social research investigations in China are subject to strict rules, and the collection of personal data must be conducted carefully to comply with the law. ■

<https://www.huntonprivacyblog.com/2014/08/articles/foreign-couple-found-guilty-illegal-collection-personal-information-shanghai/>





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The sweet spot

With the predictability of a stopped clock that's right twice a day, there will always be at least one voice forecasting the death of market research.

To me, this is like obsessing about the end of the horse-drawn carriage, or the demise of sugar. These are delivery mechanisms. People will still need to get from A to B, and we'll always want sweet stuff.

For my part, I predict that future organisations will still want to understand their customers, whether to increase revenues or decrease costs. Methods will change, but the motivation will remain the same.

The depth and sophistication of customer understanding will become ever more significant as a competitive differentiator.

Data aggregation and DIY research are useful, but don't automatically deliver customer insight. If you don't know the right questions to ask of all that expensive data – particularly as increasing regulation ratchets up data handling costs – you will waste a lot of money.

It is a privilege, here at MRS, to be able to bring together and present the collective experience and perception of one of the largest and most sophisticated markets for customer understanding in the world.

In the past, we have smashed together artists, scientists, psychologists, political and social commentators and business leaders, all focused on expanding on the 'how, why and what' of customer understanding.

Which leads me neatly on to our call for contributions to the MRS Annual Conference 2015 (see opposite). A highlight in the research calendar, it is your contribution that attracts a record-breaking number of attendees every year.

So this is when we give the sector a collective squeeze and extract the best, the boldest and the most transformational ideas, case studies and methods.

You might call it the sweet stuff.

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



MY SOCIETY



MRS Annual Conference – Call for contributions

This year's conference is entitled 'Impact 2015: Understanding customer behaviour in a world of change'.

The insight world's leading event will tackle the critical issues at the heart of effective customer understanding. Impact 2015 will squarely place the most provocative, imaginative and effective ideas centre stage. Through keynote speeches, debates, case-studies, workshops and experimentation, the conference will acknowledge the complexities and contradictions inherent in modern customer understanding, and then point a way forward.

There will be a strong emphasis on practical advice and inspiration at Impact 2015. We want delegates to leave the conference equipped with the ammunition to make significant change in their own business.

If you have risen to the challenge of making sense of a world in motion, then we want to hear from you. And so will our delegates.

Find out how to submit a contribution on our website.

mrs.org.uk/annualconference

Calendar

Member events

November

10 – Advanced Analytics Members' Evening, London

December

8 – MRS Awards Dinner, London

Training highlights

Advanced Games for Research Playshop 24 October

If you want to future-proof your research, this workshop is thoroughly recommended.

Introduction to Experimental Research Design

5 November

Experimental designs allow you to isolate the effects of key variables, providing accurate interpretation of data.

Negotiating with Internal Stakeholders

10 November

Learn the strategies and techniques to persuade and influence others to achieve a mutually beneficial result.

Advanced Semiotics

25-26 November

Understand how best to decode and creatively reconfigure for competitive advantage brand communications in their cultural contexts.

Neuroeconomics

28 November

The focus will be on a hands-on exploration of neuroeconomics – an increasingly important field within market research.

Conferences

October

30 – Customers Exposed, London

November

5 – Harnessing Open Data for Business Advantage, London

20 – Financial Services Research, London

27 – The Influence Society, London

Find out more at mrs.org.uk/events

Book your place: MRS Awards

The MRS Awards celebrate research's ability to drive innovation, inspire change and deliver results. Entries for 2014 closed on 23 July and finalists will be announced in October. The winners will be revealed at the MRS Awards dinner on Monday 8 December. Book your place now at mrs.org.uk/awards

Customers Exposed

Thursday, 30 October 2014

This is a new conference for every research buyer and practitioner who wants to get to grips with the challenging realities of business. This one-day event will offer 10 provocative views of the modern consumer and offer guidance on how we can improve our understanding of them, and better exploit the opportunities. mrs.org.uk/customersexposed



Customers Exposed

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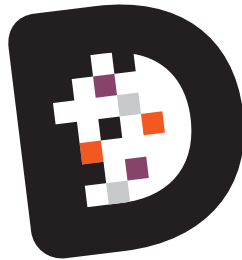
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MRS highlights in 2013-14

"2013/14 was a year in which MRS took its mission to protect, promote and connect the research sector in all its forms to some of the most powerful organisations in the UK," writes Jane Frost in her introduction to the MRS Annual Review 2013-14



Fair Data™



April
Roisin Donnelly
Brand director, Northern Europe, Procter & Gamble, becomes MRS patron:
"I encourage all of my marketing team to go out and meet consumers and understand their total life – not just the few minutes they spend with the product or in store..."

May
Following the closure of COI, **MRS makes recommendations** to GPS and UK SBS, which are included in the new government research procurement framework.

June
MRS launches the **Delphi Group**, a thinktank set up to research and investigate the most important business and public interest issues of the day.

July
MRS broadens the options for studying for MRS qualifications by **accrediting** Aston Business School and the Research Academy.

August
MRS refers **G4S** to the ICO for work undertaken by prisoners under the pretext of 'research'.

September
R-Net, the MRS **network for young and new researchers**, celebrates its 10th birthday. The group began with seven members and has since hosted 60 free events attracting more than 1,000 subscribers.

For the full review visit <http://www.mrs.org.uk/annualreview>





October

MRS visits Edinburgh, Manchester, Birmingham, Bristol, Winchester and London to **consult members** about membership grades, CPD and the code, and share ideas to help shape the future of MRS.

November

MRS refers the **Conservative party** to the ICO, as part of a complaint about collection of data for campaigning or other purposes under the guise of research. The ICO ruled that guidelines had been breached.

December

The industry celebrates at the largest-ever **MRS Awards Dinner**, attended by more than 800 of the sector's leading buyers and research providers.

Impact magazine wins 'Launch of the Year 2013' at the International Content Marketing Awards.

January

The Market Research Society of Singapore (MRSS) adopts the 10 core principles of the **Fair Data** scheme and invites members to sign up to the programme.

The trust mark has now been adopted by 32 companies in the UK.

February

A report published in the *Global Research Business Network* – of which MRS is a founding partner – finds **"31% of UK and US citizens do not trust their governments with their personal data, and 41% said they don't trust research companies."**

March

"We need more skills in data, and we need more skills in digital," says Sir Martin Sorrell, MRS patron and founder and CEO of WPP, speaking at the MRS Annual Conference 2014.

MRS launches the first continuous development programme (CPD) for the research sector.

Dianne Thompson CBE, chief executive officer of Camelot Group, becomes MRS president.



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*

CONFERENCE

Customers exposed – a one-day event to be held on October 30 in London – aims to give research buyers and practitioners the chance to get to grips with the challenging realities of business. In all, 10 speakers, including Rob Myers, Tom Ewing, Becky Rowe (pictured) and Dr Emma Macdonald, will offer their views on modern consumers, guidance on how to understand them better and exploit the opportunities they represent, as well as insight into the general trends currently driving business.
<http://bit.ly/WaK0wT>



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Speaking easier

Behavioural economics dictates that researchers should stop asking questions, be quiet and listen. But engaging in conversation, says Sabine Stork of Thinktank, is one of the cornerstones of qualitative research. Find out what happened when the company set up a conversation bar in Brixton Village market, (pictured).
<http://bit.ly/1oTefTk>

Techie teens changing comms landscape

The digital native generation is leaving adults standing when it comes

to digital confidence, says the latest Communications Market Report from Ofcom. Jane Bainbridge outlines how this confidence leads to fundamentally different digital habits.
<http://bit.ly/1AZOkQq>

How the other half lives

Economic anthropologist Jovan Scott Lewis took part in an advanced internship programme at Northstar Research Partners. He describes his observations, and what he thinks academia could learn from the commercial sector.
<http://bit.ly/1u7r2XD>

IJMR

Helping the public see the value of social research using social media

Social research using social media is an evolving field, but the public are often concerned about the extent to which their personal information is publicly available and leaves them vulnerable. Alexandra Fry explains why transparency is key to gaining trust.
<http://bit.ly/1rMuyG7>

An alternative look at knowledge mobilisation theory

Chris Brown reviews current models of 'knowledge mobilisation' and outlines a number of 'knowledge adoption strategies' to improve the dissemination of research findings.
<http://bit.ly/1u0hrQc>

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