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ISSUE 9 APR 2015

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Social words

Jane Bainbridge
Editor

The news these days can, sometimes, be as preoccupied with the social media comments that an event elicits as with the event itself.

In the UK at the moment, there is a plethora of significant stories, including one of the closest-run General Elections in recent history, and constant speculation about interest rates and how far global oil prices will fall. However, one of the most eagerly discussed, and commented on, news items has been whether the BBC would sack Jeremy Clarkson, presenter of motoring programme *Top Gear*, for hitting a producer. Clarkson was, ultimately, sacked – but not before social media sparks flew, with his supporters' increasingly vitriolic words often aimed directly at the victim of his assault.

This is the latest in an ever-growing list of incidents in which social media has brought out the worst in people. Streams of hate-filled Twitter chat aimed at everyone from middle-aged, female historians with the audacity to be clever and not to dye their grey hair, to those who dare to support the No More Page 3 campaign – against *The Sun*'s outdated obsession with women's breasts – have thrown this social phenomenon into stark relief.

So it's worth being reminded of the good that can come from the internet's ability to offer a platform to otherwise ordinary individuals: people without fame, who are leading regular, humble lives.

Justine Roberts, CEO of Mumsnet, talks about this – among many other things – on p26. She champions the function of the parenting forum in allowing anonymous discussions, in which the predominantly female membership can feel free to share their experiences and offer support to each other because of their "collective anonymity".

In the Careers interview (p78), Jon Alexander – of the New Citizenship Project – discusses how the web has become the dominant global medium and is, thereby, promoting broader "many to many" societal interaction.

In our business of investigating people's behaviour, the free flow of ideas and interactions – and the immediacy of determining why and when people do certain things that the digital explosion allows (see special report, p32) – is a powerful tool, and one that it's now unimaginable to live without.

Finally, I would like to point you to two sections in this issue: our MRS annual conference round-up – a more traditional information-exchange format, where a CEO, a general and an author joined marketers to share insight; and Rory Sutherland, who is always thought-provoking and writes his first column for *Impact* (p7).

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P15 DITTY_ABOUT_SUMMER / SHUTTERSTOCK
P16 RAWPIXEL / SHUTTERSTOCK
P18 KITCH BAIN / SHUTTERSTOCK
P20 WILL AMLOT
P26 WILL AMLOT
P32 JOE MCDERMOTT / ILLUSTRATIONS
P63 OLEG ERIN / SHUTTERSTOCK
P68 GIUSEPPE COSTANTINO / SHUTTERSTOCK
P70 HELGA-SCANDINAVUS / SHUTTERSTOCK
P72 BRONWEN MORGAN

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CONTENTS - ISSUE 9 APR 2015

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Fisher is a freelance writer specialising in marketing. For this issue of *Impact*, she met with the audience insights team at the BBC, p44.

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Amlot, a regular contributor to *Impact*, photographed Mumsnet CEO Justine Roberts for our Profile piece on p26. willamlot.com

GLOBAL BRIEFINGS

SPECIAL REPORT

FEATURES

FOCUS

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Bold is a journalist specialising in media and marketing. He was part of our reporting team covering the Impact 2015 conference, p20.

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Morgan is a former researcher, and deputy editor of *Impact*. She interviewed Aviva's Neil Costello for the insight & strategy feature, p56.

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The shape of the tolerance zone

There are 10 of you, and you want to go to dinner. The other nine people include two vegetarians, a curry-addict and someone who likes anything ethnic. Some of the rest have very mild preferences; others aren't really bothered where they eat. You have boiled down the choice to six restaurants. How on earth do you decide where to go out and eat?

Currently, the way in which we try to resolve such problems can be highly unsatisfactory. People may game the system by exaggerating the intensity of their feelings – noisily campaigning for their favourite option to the exclusion of anyone else. After all, you have nothing to lose by pretending to care a huge amount about going to a restaurant you only slightly prefer to all the others.

Or perhaps the opposite happens. In a kind of triumph of lazy compromise, you end up going to the restaurant the fewest people object to. This generally means that everyone ends up in a pizza restaurant, pizza being a kind of default food which offends no-one. This is OK, so far as it goes, but it always seems a little sad to me to pay £35 or so for a meal which is not much better when prepared in a restaurant than when bought for £5.95 and cooked at home.

If only there were an app that could sort out this problem. Something that could help a group chart a safe course between the Scylla of minority tyranny and the Charybdis of lazy consensus.

When such an app appears, I suspect it will make use of the idea of Quadratic Voting, which was recently proposed by Glen Weyl and Steven Lalley at the University of Chicago.

"There is a trade-off between being totally inflexible and easy-going, and between caring and not caring"

Their initial proposal was that people in, say, referenda would receive one vote each, but with the freedom to buy additional votes, where the cost of extra votes for any individual would be the square of the number of votes purchased. So that one vote might cost $1, two votes $4, three votes $9 and so on. (The money raised would be paid back equally to all voters). The system would thus be sensitive to intensity of feeling in a way that conventional elections aren't, but not to the extent where a few people could overrule a large majority – at least not without paying them a fortune.

Like me, you probably instinctively recoil at this idea when applied to democratic politics. But the central principle behind this system has a widespread application in market research – and without real money being involved at all.

Let's take that restaurant problem again. Suppose your app gave everybody 500 'voting dollars' every year. When presented with a choice between restaurants, people who cared a great deal could spend 64 dollars and put it towards a vote for just one restaurant, which would count as eight votes. Others might put 16 dollars towards four restaurants, which would each count as four votes. The vegetarian might spend nine dollars voting against the steakhouse. The indifferent could save up their dollars for another time, when they actually cared about the outcome.

This works a little like a truth serum. Because there is a trade-off between being totally inflexible and easy-going, and between caring and not caring, this mechanism encourages people honestly to reveal the breadth and shape of their zone of tolerance. Hence it uncovers, both individually and in aggregate, a level of nuance that no other system quite matches.

I would love to know what people think of this idea. Let me know via Twitter to @rorysutherland.

Rory Sutherland is vice-chairman, Ogilvy & Mather UK

Global briefing

News, views and insight from around the world – from wearable data making a Canadian court appearance, to launching cider in Switzerland. Compiled by **Jane Bainbridge** and **Bronwen Morgan**

CANADA – p18
Wearables can track physical activity that may help athletes and fitness fans but, as information from a device is used for the first time in a legal case in Canada, could the data collected have wider consequences in future?

UK – p12
Brand reputation can be scored on three dimensions of 'good' – good actions, good recommendation and good engagement – according to Chime Insight and Engagement. In the firm's study, the 'triple G' winners were dominated by retailers.

UK – p10
The rise of digital media may have made life tougher for direct mail, but Royal Mail MarketReach's multi-stranded insight work has identified how this traditional method achieves impact and can be used as effective brand-building communication.

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RUSSIA – p13

GfK's study into connected cars explored people's views on driving and future innovations. In Russia, where 40% of motorists spend seven or more hours a week driving, the conditions on the road are tough, with heavy congestion and frequent accidents. However, Russians view themselves as good drivers, so are not worried about dangerous driving.

SWITZERLAND – p14

Switzerland protects its apples and apple drinks – just one of the obstacles Carlsberg had to overcome when it looked to launch its Somersby cider brand into the country. Faced also by a small population, divided into French and German speakers, the drinks company called on Catalyx to research how best to reach Swiss cider drinkers.

JAPAN – p16

It's all too easy for those researching Asia Pacific to bypass Japan altogether. However, with its 127m population, and unique cultural outlook, it has been described as "the hardest economy in the world to understand", as Simpson Carpenter's Alexandra Hodge explains.

FINLAND – p15

If data about how students study and respond to the education process is analysed, clear 'tribes' of learners can be identified. This is the thinking behind education platform Claned, which is trying to help students and educational institutions across the world to use data analytics to aid learning.

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UK

You've got mail

Measuring the impact of direct mail has mostly focused on return on investment. A new study from Royal Mail MarketReach looks through the letterbox and reveals that it may also deliver brand-building benefits. By **Bronwen Morgan**

The Royal Mail is the third largest media owner in the UK, after Google and ITV. However, unlike its digital and television counterparts, the impact of direct mail has been difficult to gauge beyond return on investment (ROI).

Anthony Jones, head of insight at MarketReach – the direct mail division of Royal Mail – says that, before he joined the company at the end of 2013, there had been a lack of insight beyond a certain point in the postal process.

"There was a lot of information around the delivery of bits of paper," says Jones, "and there was quite a lot of analysis out there about the response that those pieces of paper generated, whether they be personal letters, statements, bills or leaflets. For many years, that had been all the industry really focused on – did you get more return than the investment?"

Jones and the team at MarketReach felt there was a distinct lack of insight into what happened once those pieces of paper went through the door. In order to convince brands that mail wasn't just a direct-response medium, but a potential brand-building one, they needed to understand more about the impact mail has on wider measures.

"We had an inkling that mail hung around the house for quite a long time and gave brands multiple opportunities, among multiple people, to communicate," Jones says.

To investigate, MarketReach commissioned Trinity McQueen to conduct a week-long ethnographic project among 12 households. Each household was interviewed about its media consumption, then stop-motion CCTV cameras were placed around the main media-consumption areas of their home. In the course of reviewing the 800-odd hours of CCTV footage, the team noticed a discrepancy between what people said they did with mail and what actually happened.

"One of the key findings was that – if you ask people what they do with their mail – broadly, two-thirds will say they bin it immediately; they

don't look at it," says Jones. "But when we asked people what they had done with the delivery they received that day, about two-thirds had opened it. And a significant proportion of those had then done something as a result of opening it – not just binned it.

"We've got some great footage of a bloke up in Yorkshire saying: 'I bin everything – junk mail; everything.' Yet there was a massive amount of evidence of him opening the mail, sitting there, reading it, and acting upon it."

This insight, says Jones, led the team to decide that they needed to quantify this behaviour. "We needed to keep drilling."

In total, Royal Mail MarketReach undertook eight separate strands of research (including the ethnography) over the course of 18 months, resulting in an extensive report: *The Private Life of Mail*. The strands included: a number of quantitative studies; focus groups; a review of academic papers that focused on the psychology of touch; and neuroscience.

"When we realised that what people were saying and what they were doing were quite different, we assumed that the great British public weren't lying to us, and worked on the basis that mail was probably so ingrained into their normal daily lives that they don't really think about it," says Jones. "The obvious way to try to understand that was to do some neuroscience."

MarketReach worked with a company called Neuro-Insight, which uses a methodology known as steady state topography (SST).

SST measures electrical brain activity in response to a stimulus: both the intensity and the speed of reaction are captured. Respondents were asked, in their own homes, to open any mail or emails that they received – although, if they wouldn't normally have opened a particular piece of mail, they weren't asked to do so – as well as to watch television.

Jones says the results were quite shocking. "We were pleasantly surprised to find that the mail exposure on the key long-term memory encoding metrics were the highest that Neuro-Insight had ever seen: about 75% higher than TV and about 30% higher than email. Our initial reaction was to ask them to double check their figures."

The MarketReach team also identified some indicative evidence – they intend to conduct further research to investigate this in more detail – that mail was priming TV, and vice versa.

Jones explains that, using *The Private Life of Mail* report as a platform, Royal Mail MarketReach intends to build a case for why mail has a role in brand-building communications. What this also means is that direct mail is, ultimately, taking a step towards being as trackable as its digital counterparts.

"Every other media has its own currency – they have the head counts. We haven't got anything like that currently, and that's certainly something we are giving serious consideration to," says Jones.

"It's a logical leap from *The Private Life of Mail*: now we know what's going on in people's homes, we need to try to find a way of potentially enabling advertisers and their agencies to count more in terms of the coverage and frequency of communications."

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UK

Good reputation

Research into brand reputation from Chime Insight and Engagement identified characteristics shared by the most respected brands among UK consumers, says **Caroline Bates**

Brand reputation is founded on three key components – what you do, what you say, and what other people say about you. But what are the benefits to a brand of performing well across all three, and do some sectors deliver better on this than others? Chime Insight and Engagement (CIE) set out to measure and quantify these elements of 'soft capital' collectively – scoring brands for good actions, good recommendation and good engagement. The aim was to find the brands that score highly in all three: the 'triple G' brands.

The research programme questioned 12,000 UK consumers across a nationally representative sample covering 12 sectors and 120 British and global brands – and included 55,000 verbatims.

Brands fulfilling the 'good action' criteria were recognised by consumers as doing the right thing even when no one is looking – and they received an Action G. Brands that have a strong engagement with consumers through a personification scale including affinity and likeability were given an Engagement G. When it came to the brands most likely to be recommended, only the views of consumers expressing the polar extremes – love or loathe – were included, as these active promoters or detractors are most likely to pass on their experiences to others.

Of the 120 brands included in the research, only 16 gained triple G status.

Retail dominated the triple G winners, revealing the UK to be a nation of shopkeepers and shoppers. These brands have a clear offering and understand what their customers want. Waitrose and John Lewis are shining examples of retail brands whose values are imbued in everything they do – and consumers agree they deliver on quality and value for money.

Clare Gough, head of insight at Waitrose, believes the secret to triple G status is trust and empowerment at all levels. "A brand with strong values, where staff are nurtured and developed, breeds a sense of pride and confidence that is passed on to customers," she says. "They, in turn, take reassurance from consistency and the relationship develops."

FMCG is the next category most strongly represented in the triple G brands. Nostalgia and heritage played an important role here; we feed our children and grandchildren the brands from our childhood. More than one third of UK adults – spanning the generations and affluence spectrum – would recommend Weetabix.

British consumers love gadgets, and the technology category came in third place for populating the triple G 'sweet spot', although Apple achieved only a double G in our survey.

The financial services sector – not traditionally popular with the British public – is represented in the triple G brands by Paypal, which is seen as a trusted partner in the unsafe environment of online payments. Finally, Virgin – described as distinctly and proudly British – tops the travel category. So what lessons can brands take from the behaviour of triple G-rated brands?

1 **Quality** - A great product or service is the foundation for great consumer relationships. Verbatim analysis revealed quality to be the main driver for classing a product or service as good. Consistency is essential.

2 **Respect** - Expectations of brands are rising and social media has enabled the widespread sharing of opinions – brands failing to show due care and respect, beware. The telecommunications and utility brands seem to have the most lessons to learn here.

3 **Relevance** - Consumers want products that meet their needs on an individual, 'right now' level – wanting brand 'meritage' (it's all about me) rather than heritage.

The triple G research revealed insights into the characteristics of the most highly respected brands among UK consumers. Analysis showed consumers to be open-minded, embracing the global marketplace, and placing the greatest emphasis on the product.

To ensure customer satisfaction and success, brands must pay attention to the collective elements of 'soft capital'.

Caroline Bates is director at Chime Insight and Engagement

RUSSIA

Driving change

Russian drivers, along with the rest of the world, appear to have bought in to the trend for high-tech cars. But not necessarily for the same reasons, writes **Bronwen Morgan**

Car technology has become so advanced in recent years that drivers have become almost redundant. Last year, GfK carried out a global project around these new, high-tech 'connected cars'; interviewing nearly 6,000 consumers across the US, Brazil, UK, Germany, Russia and China.

The study explored consumers' attitudes towards driving now, and their thoughts about future innovations. They were also asked to give their views on seven new connected car concepts – including self-driving, a car having knowledge of the driver's entertainment preferences, data-tracking cars, and advanced safety features – and how much they would be willing to pay.

The findings revealed some interesting quirks about Russian drivers and, as a result, the Russian car market. These drivers spend a lot of time in their cars – 40% of them spend more than seven hours per week driving – and they are most concerned overall about safety and accidents.

"Russians don't spend this amount of time in their cars simply because they are passionate about driving," says Alexander Kissov, head of automotive at GfK Russia. "The amount of time they log behind the wheel has more to do with the distances they drive daily and the high levels of traffic congestion, resulting in frequent accidents and snarl-ups in most of the major cities.

"These tough driving conditions can be very stressful for drivers, which is why car safety features and devices that can help with avoiding accidents are such a high priority for Russians."

While, of the six countries studied, Russian drivers were most likely to be worried about being stuck in traffic or traffic accidents, they were the least likely to be worried about dangerous driving. "That's because the majority of Russians perceive themselves to be good drivers," says Kissov. "Their understanding of dangerous and aggressive driving is quite different from European drivers."

Russian drivers also place high value on the way a car looks, Kissov explains, because this is seen to reflect a driver's social status. This makes customised cars highly desirable in the Russian market. This applies not only to the outward appearance of the car, but to advanced features and gadgets that appear inside. Russian drivers are highly engaged with the technology available in the latest connected cars.

"The belief is that the more expensive and advanced the car is, the cooler the driver must be," says Kissov. "And just to prove that image is all, the majority of Russian drivers who already have some smart devices in their cars rarely use them."

Russian driving at-a-glance

- 40% of Russian drivers spend more than seven hours per week driving – one of the highest in the survey
- Of the six countries studied, Russian drivers are the most likely to be worried about being in an accident or stuck in traffic, but among the least likely to be worried about dangerous or aggressive driving behaviour
- The safety benefits of the connected car are most likely to appeal to Russian drivers compared with the other countries in the study
- Russian drivers are more likely to consider craftsmanship and the latest technology in their cars as important attributes.

Sourced from GfK connected car study

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Support for cider drinking

When Carlsberg wanted to launch its Somersby cider into Switzerland, it needed research to identify a new approach

Entering a new market is tricky at the best of times but, for Carlsberg, launching its Somersby cider into Switzerland involved a unique set of challenges.

Despite the brand being on sale in 35 markets across the world, the Swiss Carlsberg team was nervous of replicating the global marketing toolkit because of the specifics of the Swiss market.

Guy White, founder of co-creation experts Catalyx, which worked with Carlsberg on the project, explains: "Switzerland is very small – only eight million people, so the same population as London – but it has four official languages, 20% of the population are expatriates, and only 2% of its cider is imported."

Added to this, apples and apple drinks are protected. "William Tell is [one of] the founding fathers of Switzerland, so apples are an important part of national culture; the Swiss protect their apple-based drinks from import," White adds.

Catalyx decided, therefore, that bringing the end user into the Somersby launch process was key, and used online research software and services provider Dub to create the Fun Lab.

"We recruited 500 French- and German-speaking Swiss into an online environment, and took them through a range of challenges to help create the launch strategy," explains White, whose company also worked with word-of-mouth agency Coolbrandz to bring people into the Fun Lab. These people were "self-confessed, alcohol-drinking social connectors, so the perfect target audience".

"We took them through a four-stage process," says White. "We didn't give away that it was about Somersby or drinking initially, so we were looking at their open-minded attitude and social drinking behaviours. We found some interesting things: they like newness, but Switzerland is a very collective country – so people really want to try new stuff, but are scared of standing out from the crowd. Linked to that, if you do something big and strange and interesting, they'll watch it, but they won't join in that conversation."

The research also identified finger food as being critical in social situations, but the type of food differed between French-speakers and German-speakers. "It can be cold cheese and hams on the French side, but, for the German side, it's generally wrapped in pastry and warmer – but any alcohol needs some form of finger food to accompany it."

The Swiss have a huge festival season – around 12,000 events take place through July and August – and lots of brands do sampling at these.

With the ad agency Saatchi & Saatchi, Catalyx turned its insights into a range of concepts – for example, cinema tickets; buy one give one; links with social media to keep updated with festivals and key events – and asked its Swiss panel to rank and rate these.

"We found out that word-of-mouth, and being part of the crowd, were really important. We had 500 consumers online, who had been part of the co-creation for three months, and thought we could use them," says White.

Catalyx sent all the participants a crate of 24 bottles of Somersby, and a further 2,000 crates to friends that they recommended. "We said you're the start of this, and we'd like you to have a party and take pictures and post online. We didn't force them, but said we'd like them to," White explains.

While there was 6% aided awareness before the Somersby launch, this increased to 20% the day before the launch (tracked by Millward Brown). "The online brand engagement was three times more than expected and on-trade were so excited – and had heard so much about the brand – that it brought forward the launch on-trade by almost a month," adds White.

SWITZERLAND

FINLAND

Tribal education

Finnish learning system company Claned is using data analytics to sort students into tribes based on their way of learning. By **Jane Bainbridge**

In 2013, three entrepreneurs decided that – with the education system under attack and educational outcomes falling short of the needs of today's job market – it was time to disrupt the system; so Claned was born.

Learning management systems are not new, but – as Claned's CEO, Mervi Palander, points out – they were rarely used by students because they were designed with institutions' administrations in mind.

"Education organisations around the world offer a standardised, one way to learn, but millions of students find that this one-size-fits-all approach does not suit them," says Palander.

So Claned's approach has been to create a more personalised learning process by putting students into groups. "Sorting students into learning tribes, as we call them, helps individuals to find study buddies who are interested in the same topics, on a global level. This provides them with, for instance, education content recommendations based on peer group performance and experiences," she says.

Palander says it's possible to identify a "huge number" of tribes based on the parameters it is analysing, but it is not practical to segment these into a large number of micro tribes.

"We want our data to be actionable and, therefore, typically only show the largest three segments [tribes]," she says.

"The idea with tribes is singularity between students, so we are usually forming three tribes out of one group. One example is about difficulty – one tribe thinks content is too difficult, one thinks it's OK, and one that it is too easy.

"Another could be about learning characteristics; for instance, social learners who want interactions with peer groups and teachers; independent students who don't need social interactions or interventions; and cook-book students, who need instructions of what to do and when to do it."

From the data, parameters such as learning orientation, focus, motivation, flow experience and collaboration activity are measured. "The differences tend to be contextual and change depending on study subjects, social stimulus, and so on."

Gathering the data to identify the tribes is done automatically and by asking the student questions that can be answered with a simple click-and-swipe action.

"Claned is designed to support the students in their daily challenges and provides a number of reasons to use it regularly while studying," says Palander.

"It captures data on every interaction the student makes with the system – when they read, write, collaborate, organise and plan; everything that students do.

"Our algorithms process all the events and data captured, which results in insight that shows students' study performance, as well as learning orientation – but also their motivation, emotion and stress levels. Until now these factors, although researched and studied, have never been returned to students or teachers."

Palander says the information gleaned helps the students to understand how they learn, provides intervention possibilities to teachers and helps education organisations to improve their offering and competitiveness.

Claned is free to students, with further education institutions paying an annual subscription fee. Ironically, although the system was created in Finland, the country has no private education sector, so Claned has had to look to overseas markets for most of its business. It currently has pilots in Saudi Arabia, Indonesia and Singapore, and its first in the UK.

Claned is not lacking in ambition; the aim, says Palander, is to achieve a paradigm change in education to focus on the individual learner.

JAPAN

Turning Japanese

Japan is often overlooked by researchers in favour of other countries in the Asia-Pacific region with a higher international profile. According to **Alexandra Hodge**, head of qualitative at Simpson Carpenter, it's time for this to change

"We are targeting all leading cities in Europe as potential flagship locations, starting as of now," said Berndt Hauptkorn, CEO of Japanese fashion brand Uniqlo Europe, in a recent interview. "If by 2020 we want to become the largest retailer in the world, we cannot focus on Asia solely."

Since Japan opened up to the rest of the world a century and a half ago, it has experienced an economic rollercoaster ride. During the miracle economy of 1960–1990, Japan's manufacturing industry drew on growing demand from abroad for product ideas, improved manufacturing efficiency and exported superior products. The term 'Made in Japan' became synonymous with top-quality, reliable products guaranteed to be better than competitors.

Then came two lost decades of economic depression and stagnation, triggered by the collapse of the domestic asset bubble in 1991. Current Prime Minister Shinzo Abe, who has been in office for two years, is adamant he will turn things around with his own brand of economics: 'Abenomics'.

One facet of Abenomics is the implementation of corporate tax cuts to encourage a business-friendly economic environment and companies to increase salaries.

The government is also participating in a Trans-Pacific Partnership (TPP) free-trade treaty, a policy that encourages trade throughout the Asia-Pacific region. The treaty has inspired a sense of optimism among its supporters, with Abe declaring in 2013: "Ladies and gentlemen, Japan is back."

In terms of market research, Japan is now the largest market within the Asia-Pacific region and the fifth largest globally. Virtually all the industry's turnover comes from domestic clients and very little – less than 5% – from international clients.

As an industry, we are prone to following trends of research in particular markets. Most clients simply can't commission research in every key market, so one or two markets sometimes need to stand in for entire regions of the world. Which markets get picked can be a matter of preference.

Clients often feel they should be doing more research in Japan as no other market quite correlates to it. According to Citigroup's chief economist, Willem Buiter, Japan is "the hardest economy in the world to understand. If this were physics, then gravity wouldn't work in Japan". But there is also a reluctance to spend resources doing work there for the exact same reason.

That said, at Simpson Carpenter we have seen a shift in the past few years, particularly on the quantitative side. The cost of including Japan in a multi-market online survey is small enough and the upside is fantastic. But, on the qualitative side, we are more likely to have clients ask us to go to China than Japan, even if Japan is an important market for them.

What about Japanese brands in non-Japanese markets? To build global competitiveness, much of Japan's focus in the past 40 years has been on the US and, more recently, south-east Asia. The TPP treaty also focuses on the US. Working with international Japanese corporations, it appears Europe often plays second fiddle, where, in fact, it could pay to redouble efforts in this region to drive export success.

Europe, with its multiple countries, cultures, traditions and languages is an intimidating contrast to a country such as Japan, with its homogeneity, traditions and values, and just one government. Yet, by appreciating the similarities and differences across countries – as well as seeking deep cultural understanding – we can provide the insight required for Japanese brands to flourish. This will help Japan fulfil its unique and compelling potential to become a globally competitive nation again.

Population:
127m

Unemployment rate:
3.6%

GDP:
$4.9trn

GDP growth:
2.2% (annualised from Q4 2014)

Inflation rate in Jan 2015:
2.4%

Source: tradingeconomics.com; Japan.Inc; BBC Business News

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Trial by numbers

Wearable devices help millions of people keep track of their physical activity. As data from a device are used in legal proceedings for the first time, are there wider implications for the collection of this type of information? **Bronwen Morgan** discusses

Lawyers representing a personal trainer in Calgary, Canada, have been the first to use data from a wearable device as evidence in a court case.

The case involves the plaintiff, a personal trainer, claiming that an injury sustained in an accident has led to "life-affecting" reduced activity. Data from the individual's Fitbit fitness tracker are to be provided as evidence of this.

Around 6.7m UK adults were using health and fitness wearable devices and smartphone apps in October of last year. The opportunity to have access to objective data on the impact of an injury on a person's physical activity – in addition to expert clinical interpretation of that impact – is clearly helpful in this scenario. But there are wider repercussions for the use of this kind of data in court, says Eduardo Ustaran, partner at law firm Hogan Lovells International, and a specialist in data privacy law.

"From a privacy perspective, this is something that will have legal implications because, according to recent case law, capturing data such as images and audio so widely in a public space is subject to EU data protection law," he says.

"This means that the user of the device becomes responsible for ensuring compliance with the law. The reason for this is that courts and regulators seem to be trying to put a halt to the increasing surveillance society in which we live."

As more and more data are produced, ensuring this is handled and processed correctly becomes even more important. According to Riaan Conradie, a computational biologist and founder of health firm LifeQ, the future of wearable technology in fitness and health is moving away from development of devices and towards a focus on what can be done with the data they collect.

"The future of wearables is not the wearable devices *per se*," he says.

"Wearable devices are becoming more sophisticated, but we need to be able to drive understanding from the data that we obtain from wearable devices.

"People get overwhelmed with the vast amounts of data and, ultimately, this data is not yielding understanding and insights that a person can act upon."

Conradie compares the future of this kind of data analysis to systems used in mapping weather: limited data streams are used in conjunction with sophisticated mathematical models to yield accurate long-term forecasting.

But anyone looking to combine different elements of health data must be wary of the legal implications. In February 2015, the Article 29 Working Party – an EU privacy watchdog – offered guidance on when data generated by lifestyle or wellbeing mobile apps should be treated as 'health data'. It was felt that raw personal data could quickly turn into health data when the dataset could be used to determine someone's health status. This is important in the EU because information that is capable of personally identifying an individual must be handled in accordance with data protection laws.

"When conclusions are drawn about someone's health, regardless of their reliability, these conclusions are to be treated as health data," the report said.

"There has to be a demonstrable relationship between the raw data set and the capacity to determine a health aspect of a person, based on the raw data itself or on the data in combination with data from other sources."

Nevertheless, Conradie sees the use of data from wearables in court cases as fascinating, but not unexpected.

"This is a logical next step, as continuous information streams derived from wearable devices will become increasingly more representative of an individual's unique physiology and behaviour," he says.

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BEN BOLD, **JO BOWMAN** AND **BRONWEN MORGAN** REPORT FROM IMPACT 2015, THE MRS ANNUAL CONFERENCE WHERE THE AUDIENCE WAS INFORMED, ENTERTAINED AND CHALLENGED

"This is a leadership moment for the market research profession," Unilever CEO, Paul Polman (*pictured*), told delegates at Impact 2015.

In his keynote speech to the annual conference, Polman said the industry must use its assets to drive change, and that the profession had so far failed to do this effectively. "There's an incredible amount of data, which could be useful, but some sectors are drowning rather than using it to drive action," he said.

Polman described how brands have a central role in driving awareness and impact around subjects such as global warming, poverty and inequality. These issues can be addressed together, he said, by putting the interest of the common good ahead of our personal or business interests.

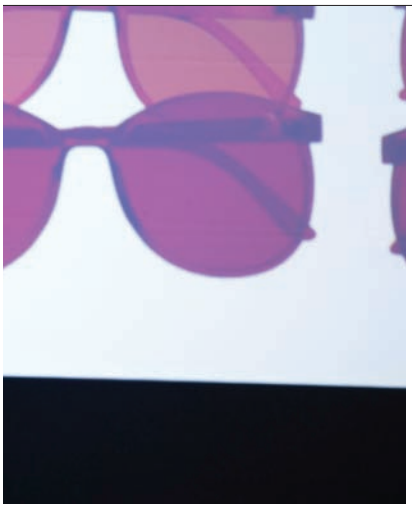
"Market research is more important than ever," Polman said. "We are losing the plot in many ways – the environment is becoming increasingly volatile. We must come together to make an impact, to drive change. Insight will be central to this."

Consumers are more connected and engaged than before, Polman added, and insisted that this is an opportunity for brands to connect with them emotionally. Business models, he said, must represent people who can't represent themselves: "By prioritising social issues, business success can follow."

Polman gave the example of Unilever soap brand Lifebuoy, which has a social mission to improve life expectancy around the world – particularly in sub-Saharan Africa and Asia – by teaching healthy hand-washing practices. As a side effect of this, the brand has experienced significant growth. "We can solve challenges and, at the same time, grow business by breaking bad habits and changing behaviour," he said.

After stressing the need for leadership within the market research profession at this time, Polman urged conference attendees to ask themselves a number of difficult questions.

"Are you doing enough? Not just responding to client briefs, but making a contribution to mankind? What can you do as an industry? What can you do personally?"



A manifesto for change

Market researchers urged to take a walk on the wild side

Tom Woodnutt, founder of Feeling Mutual, believes researchers must adapt to prove their value in a world where there is so much data and a reluctance to invest in market research. "There are a number of problems with traditional research," he said. "It can be very expensive and slow, which is incompatible with the agility brands need."

To combat this, Woodnutt gave three principles that researchers should embrace. The first is to shift from being a messenger to being a value negotiator, balancing what brands want with what people want. The second is to move "from science to experience", by earning the right to engage with consumers by making the research more fun.

The third principle, said Woodnutt, is to move from being a collector of data to a curator of meaning. "We need to take more responsibility for the insights we create."

James Eder (*pictured*), founder of The Beans Group, urged attendees to be entrepreneurial by imagining a scenario in which they could not fail: "Who would you be? Where would you go? What would you do?"

Nick Gadsby of Lawes Gadsby Semiotics, told the audience that innovation needn't be about reinventing the wheel. He talked of different types of newness: incremental (for example, iterations of Windows OS); oppositional (new products at odds with previous lines, such as Coca-Cola Life); and archaic (the trend for nostalgia). "We're always looking for familiarity in the new," he said. "No thing comes from nothing."

Qual researchers must "walk tall in the land of machines"

Technology is a tool, not the star of research

At a time when researchers are obsessed with technological innovation, emotional intelligence is what sets qualitative researchers apart, said Peter Totman, of Jigsaw Research.

Speaking on day two of the conference, Totman insisted that – while surgeons, business consultants and astronauts can be replaced by robots – qualitative researchers cannot. For this reason, they must use their emotional intelligence to "walk tall in the land of machines".

"Qualitative researchers are prone to being self-destructive," he said, and described the dangers of becoming dispensable by being drawn into qualitative innovation overload; scientism – the belief that only science has knowledge; and an uncritical love of technology.

By focusing on 'good' innovation – seeing things differently – rather than 'bad' innovation (actually being different), researchers can build on client and respondent relationships, rather than weaken them.

While science can aid understanding, researchers shouldn't try to play the scientist, Totman said: "Scientists seek objective truth, while qualitative researchers are looking to reveal subjective truth – that is, insight."

Earlier in the session, Ben Scales, of Davies + McKerr, had talked about "digital due diligence" – being mindful of the way audiences engage with technology and applying that to the design of research. Paulo Panizzo (*pictured*), of BSkyB, discussed the broadcaster's use of technology alongside traditional techniques, while Rob Ellis, of Cog Research, spoke of how researchers must give more importance to qualitative interviewing.

"We're asking increasingly complicated questions, but we're no better at self-reporting," Ellis said.

Summing up the theme of the session, Totman reiterated: "Technology is a tool for respondents to show us the world in their terms. It should never be the star."

Seizing the social opportunity

The rise of social media creates chances for advocacy

While word of mouth is not new, the rise of digital media has thrown fresh light on how friends and influencers play a role in what consumers think about brands, said Steve Thomson, UK managing director at Keller Fay Group.

"Brands really want to be talked about. It's not just an act of faith – there's very strong evidence that if you can increase your social profile, you'll benefit enormously," he said.

However, building a strong social profile means not just measuring word-of-mouth activity, but also acting to influence it. Thomson said brands need to measure not just digital channels, but all forms of word-of-mouth activity – essential given that 90% of conversations about brands are conducted offline.

He warned against paying too much attention to net promoter scores (NPS), and encouraged brands to track actual advocacy rather than potential advocacy. "Real life is messy," Thomson said. "People don't always live up to their NPS billing."

Similarly, actual impressions were more valuable than potential reach figures, and sentiment – while difficult to measure – was essential to understanding not just what was being said about a brand, but also what was motivating people to talk about them.

Thomson highlighted key differences in the way people talk about brands online and the way that brands perform. Consumers – projecting themselves as a media brand, of sorts – tend to be more considered in their online comments than in casual, real-world conversation.

He suggested using paid media to start conversations, and thinking about both the online and offline effects of activity. "If you do something on Facebook, don't just look at the Facebook effect, but also what's said in the pub later," Thomson added.

UK heading for "some messy government" after General Election, says pollster Andrew Cooper

Conference polling panel discussed the upcoming national ballot

The forthcoming General Election is the "hardest to read in a long time", according to Deborah Mattinson, co-founder of consultancy BritainThinks, and a former pollster for ex-Prime Minister Gordon Brown.

Mattinson found agreement among the panellists who joined her on stage at Impact 2015 – Populus founding director Andrew Cooper; Mike Smithson, a former Liberal Democrat politician and founder of PoliticalBetting.com; and James Morris, a former speechwriter for Labour Party leader Ed Miliband, and director at Greenberg Quinlan Rosner Research.

"The hard thing is not predicting poll shares, but working out what they mean in terms of the seats that parties will win," said Smithson.

Morris extolled the virtues of UK political research, saying that – of all the countries he has worked in – "Britain's opinion and political research is far and away the most open, transparent and voluminous".

While admitting the General Election is hard to call, Smithson believes Scotland is where the election will be won or lost. "Labour have picked up in England and are in a strong position, and what has happened in Scotland will probably determine the result," he said.

Cooper agreed that Scotland would be "quite critical" to the outcome, and highlighted one fringe party that will hit the Tories hard in the election. "Our analysis suggests that if Ukip is above 12% [vote share], it will start to cost the Conservatives a lot of seats," he said.

"There's an extraordinary phenomenon – [polls saying] that 25-30% of people will vote for the fringe parties. It's unlikely they will do that, but if the turnout at the polls is only two-thirds of the electorate, which two-thirds that is makes a huge difference.

"We don't have a party with a broad enough appeal to win convincingly. It's more difficult this time because of the rise of the marginal parties… but, if I had to bet, it'd be on David Cameron remaining as Prime Minister in some messy government, then more polling on the EU referendum."

Smithson disagreed: "I expect a Labour government," he said, while Morris also predicted Labour will be in power after 7 May.

‘The market research industry is lagging behind’

Clients give their views on issues raised across the two days

Former Camelot chief executive and MRS president Dianne Thompson told delegates at Impact 2015 that the UK’s market research industry is lagging behind other marketing disciplines – a point echoed by her fellow panellists.

In the ‘Client verdict’ session, Thompson said: “The very fact that you talk about people as ‘respondents’, rather than having a dialogue with people, needs to change. The whole role of social media has sped everything up.”

Her point was reinforced by Sue Unerman, chief strategy officer at media agency MediaCom, who said: “I think the world I work in is a lot more agile.” She added that the media industry’s adaptive approach to market research – “designing things, putting them together, seeing how they work” and then tweaking them – is “almost anathema to the traditional market research brief”.

For Simon Carter, executive director of marketing at Fujitsu, innovation in market research needs to centre on communication – “how we educate our salesforce and account managers, and whether we need to use infographics to capture the essence of a piece of insight”.

However, Anthony Jones, head of insight at Royal Mail MarketReach, was quick to denounce “innovation for innovation’s sake”.

Thompson was an enthusiastic advocate for “putting different methodologies together”, and is clearly no fan of segmentation.

“Over my career, I’ve probably been involved in 10-15 major segmentation studies,” she said. “They were all amazing and sexy because we could visualise very well. But in terms of how we could use them, they were useless. They’re great for PR – and great for the brand manager to see their customer – but in terms of delivering marketing messages, they were useless.”

"Good story-telling should be in the service of good ideas"

Novelist Sebastian Faulks shared his story-writing secrets

English novelist Sebastian Faulks (*pictured*) told conference delegates that, while thorough research is a must, the reader should feel they are "discovering something, not having it rammed down their throat".

The author of books such as *Birdsong* and *Charlotte Gray* – who successfully combines the often awkward bedfellows of popular and literary fiction – gave a wide-ranging and entertaining talk, in which he shared aspects of his profession, including the art of great story-telling.

Faulks' novels, particularly the early ones, are often historical, so thorough research has been a key part of his craft. "I wrote *Birdsong* [set during World War I] very quickly," he explained. "The research took two or three years, and the writing just six months.

"I would write furiously in the morning and visit the Imperial War Museum in the afternoon, and immerse myself in documents. Then I'd go home, talk to my wife about it, dream about it, and get up in the morning and start writing again.

"You have to be strict. Do the research, read it, and then shut it in a room. In fiction, you're not trying to put across the truth, but the illusion of truth. Part of the joy of reading a great novel – or seeing a great piece of advertising – is you want to feel you're discovering something, not having it rammed down your throat."

"Good story-telling should always be in the service of good ideas," Faulks added. "The theme comes first, then the characters that are capable of enacting it, then the story, for people to understand what you're on about.

"The subject matter is the apex of the triangle, the author is one corner and the reader is the other corner. Most of the time, the author and the reader are looking at the apex, but, sometimes, the author talks directly to the reader along the base of the triangle."

"Give data back to the people"

Privacy was a stand-out issue at conference

During a debate titled 'Privacy is no longer a social norm', Alan Mitchell, strategy director of data agency Ctrl-Shift, argued that the current model needs to change

"The entire market research industry is about gathering data and giving it to businesses," he said. "Just imagine if it was about gathering data and giving it back to people – empowering them with their own data."

The debate focused on how attitudes to personal information, and companies' use of it, have changed. Chad Wollen, Vodafone's group head of commercial innovation and futures, said: "Trust is at the centre of this. Old ways of interacting with people don't work any more."

However, Dr Guy Champniss, associate professor of marketing at Henley Business School, stressed the need for context: "We respond differently in different environments." For instance, he said, "people feel more confident about giving their data to John Lewis than to British Gas, which – for organisations – is a complicated reputational relationship to put in place".

Mitchell said brand reputations were being affected by the lack of choice consumers have in sharing their data: "There are two ways companies use personal data – to provide a service and to sequester and monetise that data." However, the industry standard means people have no choice but to read a privacy notice, tick a box and sign away their data. "It's toxic, and is undermining trust," Mitchell said.

Meanwhile, Champniss argued that the more data organisations study and model, the less truthful they are likely to be. "In certain categories, they look to exercise their individuality and become more creative. As soon as we know we're being measured, we try to throw the data off."

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Mum's the word

Mumsnet has extended over its 15 years from a purely advice-driven site to a major political force, whose members' advocacy is coveted by politicians and brands alike. Chief executive **Justine Roberts** talks campaigning and commerce with Jane Bainbridge

A scan through the forum threads on community website Mumsnet is tantamount to taking a mini tour of the highs and lows of parenting. The topics give an insight into family life – from the sublime to the ridiculous.

So for every highbrow 'do you call yourself a feminist?' thread, or discussion on shared parental leave, there are posts on such topics as 'how to treat head lice' or the 'unexpected joys of parenting' posts. Recipes and party themes sit comfortably side by side with online cross-questioning of politicians.

Which is part of the secret of the success of Mumsnet; it reflects the myriad issues and concerns that run through a mother's mind. One minute it's 'will this baby ever sleep?', the next it's 'why in 2015 do politician's still think they have to paint a bus pink to attract women's attention?'

When setting up the site in 2000 – along with her co-founder Carrie Longton – Justine Roberts, chief executive of Mumsnet, was very much in the mother-of-young-kids mindset.

"Initially, we expected Mumsnet to be more like *Which?* for parents. The idea was to create a place to tap into tried-and-tested advice, but largely about products and services. My initial inspiration was my failed family holiday and thinking it would have been nice if people who had been there could have advised me before I left," she says.

"The social-networking aspect was slightly stumbled upon; I remember a tech guy saying 'do you want a forum' and I asked how much it would be. He found me a piece of software for $50." That was four years before Facebook started.

Roberts has come a long way since the back-bedroom, internet start-up days; she's a regular feature in most 'influential women' lists, in particular appearing in the top 10 in the *Woman's Hour* Power List – and every self-respecting party leader wants to do a live Q&A on the site as part of their electioneering.

As every aspect of child rearing spawns its own mini industry, parental advice has also become bestselling material, but the important differentiator for Mumsnet was that it wasn't grey-haired old men telling women what to do with their babies.

"Parenting is just one of the things that you're not trained for and so many people were relying on their mum for information. We all know the amount of iterations of advice through those generations, so it was a case of who are the best people trained to help you? And that slight rejection of the expert-led view – so often the male doctor – which came with the democratisation of the internet allowed people to tap into the wise crowd," explains Roberts.

> "Collective anonymity gives people – particularly women – an opportunity to express themselves in a way that perhaps society doesn't normally allow them to"

One of the reasons politicians have been so keen to reach the Mumsnet audience is this "wise crowd" factor, but, in some quarters, the site has become synonymous with opinionated, middle-class mothers.

"Collective anonymity gives people – particularly women – an opportunity to express ▸

themselves in a way that perhaps society doesn't normally allow them to. So it's not just about them being entitled mums, it's also about them being able to do this collectively," says Roberts.

Online anonymity has got a bad press in many quarters, not helped by the vile extremes of some trolls, but Roberts thinks that anonymity is essential in the Mumsnet environment. "What has been lost in the anonymity debate is the plus side of it," she says.

"On Mumsnet, people often have real problems and issues for which they get really good advice. That's partly because they can be honest about their problem, but also because people writing under an anonymous name can be really truthful about their experiences.

"Or they may be a professional and be able to talk about things they wouldn't otherwise be able to, or simply say 'yes I hated my mother in law' or 'I had a problem with my youngest child in the same way', and really bare all. It gets to the heart of truthfulness, which is a real benefit of Mumsnet."

Reaching the wise crowd

Another benefit of the "wise crowd" of Mumsnet is that – as well as securing the site's key role of supporting parents, and generating opinions and headlines – it has also generated revenue, by appealing to brands wanting to tap into this audience.

To that end, Mumsnet Insight is the vehicle that allows companies to test products, run online surveys and start sponsored discussions with members.

Roberts explains how this form of market research became their preferred mode of monetisation. "It was partly about trying to find a business model that works when you're producing a free website. We found that market research is a not-unpopular way for brands to interact, compared with a really intrusive advert; asking users what they think has proven to be really popular.

"Our members quite like having their opinions asked on stuff, and I think the process of being asked an opinion, as opposed to broadcasting, does wonders for brands in this social media age. So we thought it was a good idea, and rapidly found that it worked for all parties – our users and the brands.

MUMSNET IN NUMBERS

2000
the year it was conceived, as a website for parents to swap advice

60m
page views

7.5m
monthly uniques

200
number of local sites it hosts

2,000+
bloggers on its network

2011
year it launched its sister site, Gransnet

> "Our members quite like having their opinions asked on stuff and I think the process of being asked an opinion, as opposed to broadcasting, does wonders for brands"

"The first thing we say to companies if they want to come and engage with Mumsnet is that you need to take the rough with the smooth – we're never going to censor, or even direct, conversations – that's not the way Mumsnet works. You've got to be confident of your product and you've got to also be genuine about your wish for, and responsiveness to, feedback," says Roberts.

But for brands with the nerve to dip their toes into the Mumsnet discussion boards, there are clear rewards to be reaped if they gain a seal of approval from members.

"Our users tell us that most of them – 8/10 – wouldn't make a major purchase without consulting Mumsnet boards. It's such a trusted environment. That's its strength really," says Roberts. "So if you do engage people in a conversation and they like your product, that's a fantastic way of gaining advocates. But, obviously, if the users turn round and say we hate this packaging or marketing then you've got to take it on board as that's quite good feedback. We never interfere with the outcome, it's a true and honest interaction."

But with a vision behind the site to "make families' lives easier", there are a number of brands and sectors that would never be allowed to take part in online marketing activities because they don't sit well with its philosophy.

"Payday loans would be an example; cosmetic surgery; gambling – things where we think, ultimately, this will cause problems for people," explains Roberts. Then there are also those brands that Mumsnet, in consultation with its users, have deemed as unethical – "Nestlé being an obvious one".

However, none of this is set in stone. "An interesting one is McDonald's, which was on the list until a couple of years ago, and then came off the list; we think that's a fairly good barometer of some of the work it's done."

For Mumsnet to reach a point where market research was a viable proposition took some time; however, this wasn't necessarily down to a lack of business strategy, but rather because of circumstance.

"To be fair, for the first five years very little happened because of the dotcom crash; we had

no money and it was a back-bedroom job being fitted around very cheap childcare and achieving very little," Roberts says.

It was once Mumsnet achieved enough scale – she thinks when it reached around 500,000 uniques a month – that it could look more seriously at positioning itself as a market research opportunity. "What we want to create is brand or product advocates. And then we want a big area to spread the word in, to a large audience that's listening to them."

> "What we want to create is brand or product advocates. And then we want a big area to spread the word in, to a large audience that's listening to them"

Annual census

As well as brands using its member base for research, Mumsnet surveys its users with an annual census that it conducts itself. "We normally get 6–7,000 users to fill in [the questionnaires], so we think it's pretty robust. And we have Google and other analytics packages, so we know what they're doing in a data-led sense."

Through this research, Mumsnet has a clear outline of its members and, given the subject matter of the site, much of the demographics are hardly a surprise.

"Mumsnet is essentially 25- to 45-year-olds, largely women and mothers, but by no means all, because we have pockets of teachers and childminders, and people trying to conceive. It is geographically pretty representative of the UK – about 10% overseas – it's slightly London and SE, but then I suspect that internet use is too. Household income level is more than average, but not significantly," explains Roberts.

"One area where it's standout different is education levels – when we last did our big census, 72% of users had a degree education or equivalent – a further qualification after school. So is it middle class? It's certainly more educated that your average and you can tell that from the conversation."

While this audience of educated, articulate women is one of the reasons politicians and

marketers flock to the site – and the thread discussions can make humorous, as well as informative reading – it has been known to get the site into hot water.

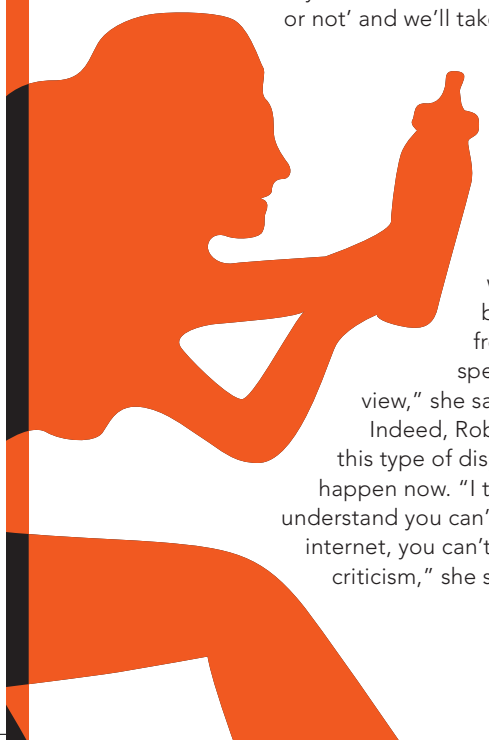
In 2007, Mumsnet was dragged into a court case with childcare author Gina Ford when her lawyers sued the website for defamation, following derogatory posts on the site. The dispute was ultimately settled out of court, with Mumsnet having to contribute to Ford's costs. There were, inevitably, a number of repercussions for the site, the primary one being that it dropped its moderation policy for a 'report the post' system.

Legal reaction

"We changed our moderation policy because the law at the time held you to account as a publisher. Now we've said we're not going to look at anything unless it's reported to us. It was very much a legal reaction because we were very vulnerable – we had too many posts to be able to check them and yet we were being treated as if we'd published them," Roberts says.

However, in true Mumsnet style, it didn't stop there. The side joined the libel reform campaign to update digital defamation rules which has since happened.

"The knee-jerk reaction for sites like us was to take down anything that anyone complained about; you could not afford to get legal advice for every single property dispute out there. Now we have the ability to say to the poster 'do you want to stand by your words or not' and we'll take them down, or you can assume the legal responsibility for them. It means there isn't a knee-jerk, let's delete everything, which I think is better from a freedom of speech point of view," she says.



Indeed, Roberts thinks that this type of dispute wouldn't happen now. "I think people understand you can't shut down the internet, you can't shut down criticism," she says.

Genuine change

Mumsnet is a child of the digital era – despite its faltering start, it found its footing as social media took off. If the closest pre-digital era equivalent was the Women's Institute, it only demonstrates just how much progress has been made in women's lives, not just in terms of networking.

But despite its campaigning and collectivism, there are times when reading headlines about how few women are in boardrooms, to how law interprets sexual consent, or which famous women young girls aspire to be like, it's easy to despair at how little feminism has achieved, despite entering its supposed fourth wave. Roberts, however, remains upbeat.

"I think there has been genuine change over the past 10 years. I don't think it's all down to Mumsnet, but I do think social media has helped. There was a lot of stuff that went unnoticed that doesn't go unnoticed now. There is a debate about the number of women in roles – there is a pressure in large organisations and politics to be more diverse and representative. Some of the campaigns we run about rape and sexual-assault awareness, some of the conversations on Mumsnet on domestic violence, empower the people on Mumsnet.

> "I think people understand you can't shut down the internet, you can't shut down criticism"

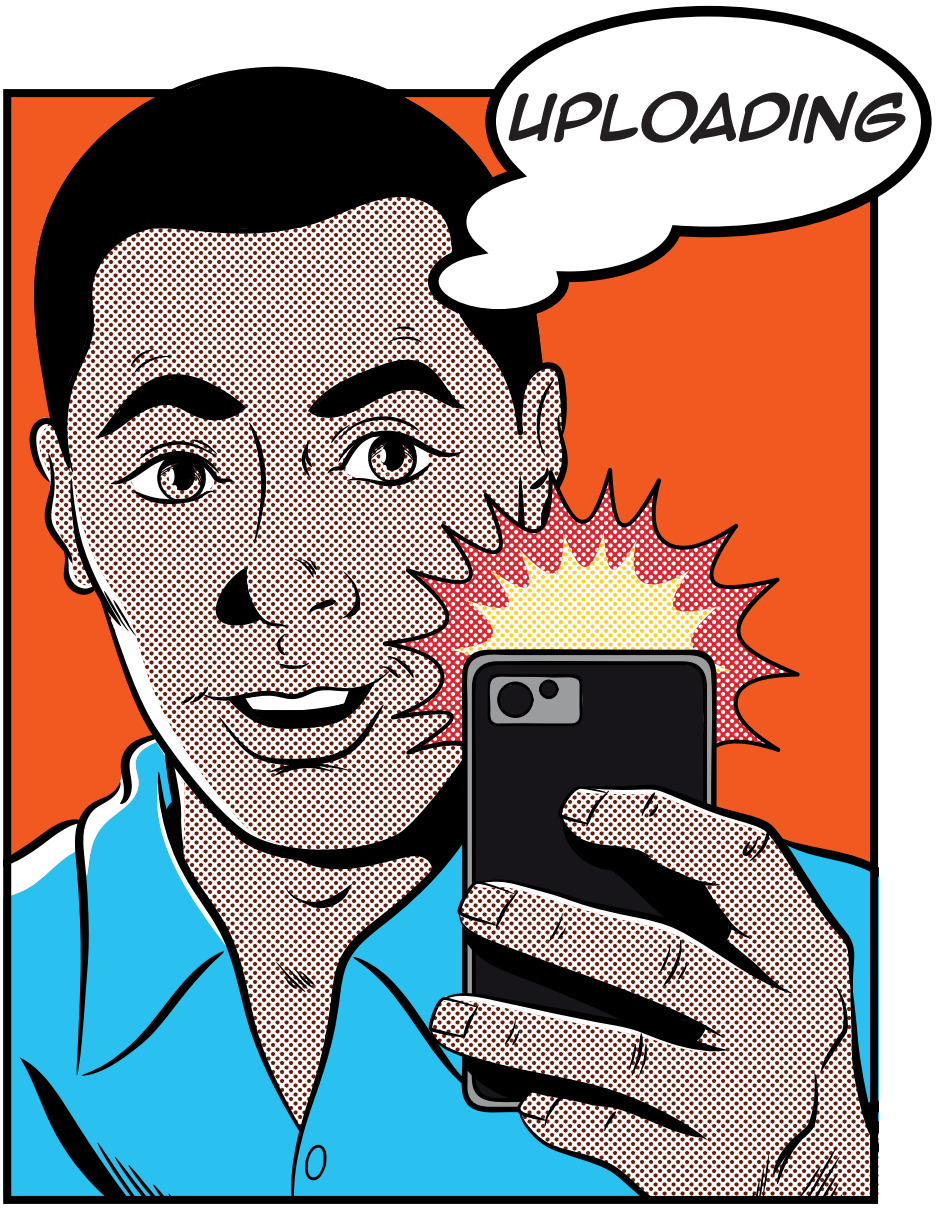
"We have surveyed our users and, broadly, they say they are much more likely to be feminist and think about these feminist issues as a result of spending time on Mumsnet. So there are changes happening, both top-down and bottom-up."

When picking campaigns – current ones include improving miscarriage care and supporting the No More Page 3 campaign – Roberts says Mumsnet always starts with threads on the boards. It then applies a set of criteria, if something is generating enough discussion, along the lines of: do a lot of people care; do the majority agree with trying to do something about it; and what is the actual purpose – is there an achievable ask?

"People feel empowered by the internet – it gives you an easy and cheap route to campaigning and, in that sense, it's quite democratising. But because women traditionally, and particularly mothers, have been really busy, they just haven't had the time to go marching and making placards," says Roberts.

TOTAL RECALL

People struggle to remember accurately why they have behaved in a certain way. So tools and technologies are constantly emerging to help researchers get closer to people – to observe and interpret their behaviour, as well as to collect data. By **Tim Phillips**



It's October 1968, and Dr George Gallup is describing his faith in our ability to witness our own lives: "To prove or disprove the hypothesis that women could not remember what they had for dinner a week ago, we brought 50 women into our interviewing centre, in Hopewell, New Jersey... we took each one by the hand and led her back through the week, and ended by establishing just what she had been doing one week ago today... We found women could recall details with amazing accuracy, details that I, and everyone else, had assumed they had forgotten."

Gallup's interviewing centre was a converted theatre that he had named 'The Mirror of America'. His point was that the brain, properly stimulated, acted as a "tape recorder", in his words. The secret of accurate recall, he argued, was simply suitable stimulation: appropriate questioning to encourage the recorder to play back.

Gallup's mirror, using this method, was likely to be distorted.

> "Groundbreaking work on the fallibility of recall was done between the wars. Bartlett established memory is reconstruction, not reproduction"

But we know that; much of the groundbreaking work on the fallibility of recall had been done between the wars. Sir Frederic Bartlett, the pioneer of modern cognitive psychology, had published *Remembering* in 1932, which established that memory is reconstruction, not reproduction. In 1913, Marcel Proust didn't need a cognitive psychologist to tell him that "remembrance of things past is not necessarily the remembrance of things as they were".

The article to which Gallup was responding in 1968 had been published in the forerunner of the *International Journal of Market Research* (*IJMR*). It laid out the industry's best response to what it called 'The Paradox of Memory in Market Research'.

Commercial pressures

This paradox, argued the article's authors, Henry Durant and Martin Simmons, was that techniques that reduced the reliance on memory in market research made its insights more accurate, but they also made the research process less efficient. Hence, commercial pressures and convenience force us to do research at a different place and time. Out-of-context research is sometimes necessary, but it is rarely optimal.

Durant and Simmons gave an obvious example: a comparison of the relative accuracy of surveys done once a week and once a day. Surveying once a day generated seven times as much data, but experimental methods had already shown that this was far more likely to be inaccurate – Gallup's argument notwithstanding – especially for unremarkable activities, such as

eating dinner. The paradox could be resolved, the authors speculated, if researchers "get the results [they] want by other means", which meant measuring in context. For them, the means did not involve taking respondents by the hand. Instead, they listed the techniques that might improve the quality of the data by measuring closer to the appropriate place, time and mood.

Durant and Simmons explored the potential for what was colloquially known as the 'Dustbin Audit' – passively collecting data from used packaging; they recommended interviewing customers at the point of sale (POS) rather than waiting, which had been introduced to the UK by the authors in 1962; they discussed "the measurement of pupil dilation and its applications", a new scientific insight that had been discussed at an Esomar conference three years previously; and they even noted a paper on an innovative camera – called the DynaScope – which had taken 1.5m pictures of Americans supposedly viewing television advertisements in 1967, and had discovered that, for 19% of the time, no-one was watching.

Almost 50 years later, market research still struggles with the paradox, and still considers large-scale transactional data, point-of-sale observation – what we have learned to call 'neuro' – and life-logging to be innovative. In the trade-off between efficiency and accuracy, clients have often decided that measurement in context, using these technologies, is not worth the expense, the methodological problems or the time.

> "When humans recall feelings and actions, we are far from the tape recorders that Gallup assumed. We forget, mis-remember and create"

For Peter Mouncey, editor of the *IJMR* – who chose 'The Paradox' as the first in a series of classic papers that are still relevant today – the trade-off is often ill-judged: "You have to compromise, but many buyers of research now do not have research experience. They are not educated, informed buyers... We knew, back in 1968, that we weren't measuring what really happens, but the methodological rigour being applied was well thought through, and was in the public domain."

Context capturing

More optimistically, technologies and innovative methods are better placed to allow us to capture context in our data in 2015. We have the opportunity to do a better job of resolving Durant's and Simmons' paradox. However, as the past 50 years have shown, it's easier said than done.

Neurological, psychological and behavioural research has shown us that, when humans recall feelings and actions, we are far from the tape recorders that Gallup assumed we were. We forget, mis-remember, and create convincing, though untrue, narratives of our lives and experiences. In extreme

LOOKING INSIDE PEOPLE'S MINDS

A combination of eye tracking and skin-conductance response was used by COG Research to try to determine people's 'brain arousal'

"We were doing pure-play eye tracking, which was objective in that it allowed us to see exactly where people were looking," says Rob Ellis, founder of COG Research, "Sometimes, that was incredibly helpful – if you were testing commercials, for example. But we're increasingly getting briefs or requests from clients that say, 'Can you tell us what's actually going on in people's minds when they're having different experiences?'."

Last year, Ellis did work for the Outdoor Media Centre for which the glasses provided real-time evidence of where the gaze was, but no measurable interpretation of the brain activity connected with visual attention – what the person was 'feeling'. "The outdoor industry has always claimed that people are more alert in the outdoor space. Some evidence of this would be a good thing to provide to the media buyer, who is notoriously tough on claims such as this, and who loves figures."

Ellis contacted Durham University's cognitive psychology team, led by Dr Amanda Ellison, and developed a way to measure people, over a day, using a combination of eye tracking and skin-conductance response (SCR), the technology used in a polygraph. This gave the opportunity to measure their level of 'brain arousal' in the outdoor space. COG has since used it for other clients, including a retailer and Channel 4.

There were two reasons for picking SCR. On the one hand, it was practical to use in context: users could walk around and do their usual daily tasks with just a small sensor on their wrist, rather than being placed in an MRI scanner, or having electrodes connected to their head. SCR is also directly triggered by the autonomic nervous system – the part of our body that controls the instinctive fight-or-flight response – so it is a quick and accurate measure of arousal.

Ellis admits this is a work in progress: "There are two levels of frustration, one of which is that people love to invent a new technological solution to something, and we're all suckers for that. Often it detracts from the credibility of good work being done. But my big beef isn't with the technology; it's with interpreting how we think this technology works."

As with any neuro or biofeedback technology, the SCR response is not sufficient on its own to determine how the subject was feeling: only that there was some feeling. The SCR data becomes a way to edit that day's events selectively – to pick out moments when the data signals arousal, and to ask the subject to recall what he or she was thinking and feeling at that point. But the highlights are stripped of their data on gaze or arousal, so as not to feed cues to the respondent. If the subject can tell a story that matches the pupilometry and the SCR data, then this is a credible insight.

Ellis emphasises that for this and similar experiments to succeed, the research design has to include a naturalistic context. "The massive downside to most technology is that it's such an artificial environment. We found clearly, through experimenting, that nothing trumps a naturalistic ecological test."

circumstances, this can lead to completely misleading recollections.

On 22 July 2005, witnesses recalled seeing Jean Charles de Menezes, wearing a heavy padded coat, vaulting the barriers at Stockwell tube station while running from the police, who pursued and shot him. However, CCTV showed a man – wearing a light, denim jacket – pick up a free newspaper, then calmly use his ticket at the barriers and stroll down the escalator.

'Squishy' memory

We know that, with the passage of years, memories – especially the 'flashbulb' recall of important events – can create an entirely new narrative. *NBC Nightly News* anchor Brian Williams was suspended after he 'remembered' being in a military helicopter that was shot down by rocket fire over Iraq in 2003. It would have been terrifying – if the events he recalled had actually occurred.

"Memory is squishy, malleable, ever-changing, and, sometimes, even invented," says Jason Brooks, vice-president of marketing science at Lieberman Research Worldwide, who has a PhD in applied cognitive psychology. "As market researchers, it is our responsibility to design approaches and instruments that can simultaneously probe squishy consumer memory, without 'jiggling' that squishy stuff so much that it gives us poor information."

For some, this means research that relies on recall is always flawed. Philip Graves, author of *Consumerology*, a book that claims "market research is a myth", says methods that rely on the belief "that asking people questions leads to revealing answers" is not measuring appropriately. For Graves, behaviour is what matters, because a survey is "not a conversation about evidence, it's a conversation about belief".

> "For Graves, the only sound contextual evidence is a contemporaneous record of what we do, which is now easier to measure"

His view is that the only sound contextual evidence is a contemporaneous record of what we do, which is now easier than ever to measure precisely, with ever-increasing volumes of data. The loyalty card replaces the Dustbin Audit; geolocation records where we are; and web analytics provide precise records of online behaviour in real, or near-real, time.

This method of measurement captures accurate context (purchases, location, search records) in the data, but few market researchers believe this, alone, is enough to create rich insight. 'Customer science' company Dunnhumby was collecting big data for Tesco Clubcard before the category had a name, but it doesn't use purchasing data in isolation. Zakaria Haeri is research development lead for its Shopper Thoughts activity, which investigates the value of combining transactional data with survey data – compiled at a later date – from the same sample.

On the one hand, Haeri's investigation supports the criticism of survey data. He argues that it is often internally consistent, but functions relatively poorly when used to predict intention to purchase in the real world.

"For a strong correlation between responses on a survey alone, you'd look for 0.7 and above. But correlate responses and how people behave – generally, we find there's consistency, but it's quite a weak relationship," he says.

"One explanation is that people have a bias against giving paradoxical responses in surveys. If they have said they like the product, they are more likely to say they would buy it later in the survey."

Survey quirks

Nevertheless, Haeri has found that survey data still improves past purchasing data as a predictor of future activity; though, again, not consistently. Haeri's data shows interesting quirks: for example, affluent respondents are more likely

to disconfirm something in a survey that the existing data shows is factually true. It's easier to know this bias exists than to decide what to do about it, other than to use it as a caution about taking surveys at face value.

At Research Now, passively collected data is most often used to prompt and validate, rather than as an end in itself. "I'm a big advocate for measured data; we do a lot of it. But it doesn't tell us why," says Ben Hogg, managing director for EMEA Portfolio Companies. "All it shows us is what's happening. But it

> "Haeri's data shows affluent respondents are more likely to disconfirm something in a survey that the existing data shows to be true"

encourages people to do quantitative research that they wouldn't have done before, because they are using behaviour data. We can discover what is happening, then we can conduct further research to understand why."

It also gives Research Now confidence that it is measuring the 'what' better, because it establishes relevance using passive measurement, especially tracking mobile behaviour.

Rather than ask panel members if they have done something at a precise location within the past day, passive measurement allows the firm to preselect a panel that it knows fits this profile, without asking would-be respondents to qualify themselves. Data both validates the responses and shortens the survey.

Another way of resolving the

'paradox' is to make it easier to capture the survey response close to the time and place, so the respondent's memory is fresh and their mental state is close to what it was at the relevant time.

Timely and accurate

Mobile data collection has made a dramatic difference to our ability to collect information in a timely, accurate way, and is now pervasive in market research.

The *GreenBook Research Industry Trends Report*, released in November 2014, showed that 64% of its respondents used mobile surveys. One year previously, the figure had been 41%. Four out of five respondents said that mobile devices were encouraging them to review the way they collected data.

The combination of the availability of devices, plus the potential to use geolocation as a vital piece of contextual information, makes mobile an important collection tool, says Hogg.

"Rather than rely on what may have happened in a bank or retailer a week ago, we can get subjects as they are leaving, as close to the moment as possible," he says. Research Now does this by building a virtual 'fence' around a location, triggering a survey when a potential respondent crosses that fence.

The mobile device can also shorten and validate responses – for example, people can photograph their cinema ticket and upload the picture. Nowadays, Hogg says, some of the most innovative work in research design work is done in collaboration with software developers, who would not consider themselves researchers, but who understand the interactivity that mobile research demands.

Mobile also provides an important 'life-logging' dimension: for example, a recent project by Research Now, to measure outdoor advertising, used a small sample that was geolocated and tracked, thereby eliminating entirely the need for recall. "We can see people's journey to work – we don't need to ask 'did you pass through Paddington station today?', Hogg says.

"We can measure what you do at home on your PC, your path to the store, what was in the Facebook feed you checked on the path to the store. We could actually see people responding to the survey in the car park outside the retailer."

At Opinium Research, research director Steve Looney has been using mobile technology to gain instant responses. "On a current project, we are using iPads to get feedback in real time. We are evaluating the display format of outdoor advertising – so not the creative, but the display format: a six-sheet against static digital against moving digital.

> "Availability of devices, plus the potential to use geolocation as contextual information, makes mobile an important collection tool"

"The study is relatively simple; we are asking a bank of questions on each display type and then some overall preference questions. We use iPads because this allows the respondents to be in front of the stimulus while answering, and also enables us to use visual stimulus when we come to the overall preference section."

In 2006, Dr Tim Snaith, chief research officer at OnePoint Global, designed a mobile-survey platform for the company that has delivered more than 40,000 projects in 74 countries, for clients including Barclays, Total, Tesco and Nielsen.

Snaith claims that, even for simple surveys (70% of the company's work is still based on SMS feedback), the platform delivers results without a recall bias, and without the presence bias that skews results when talking to a researcher.

However, he warns that many researchers destroy the contextual insight by overloading the survey.

Asking less

Snaith was inspired to set up OnePoint Global because, increasingly, he saw research as something that was being "done to" respondents. His advice for researchers who want to use mobile technology to improve research quality is: you'll get more by asking less. Don't make your respondents work too hard – use the technology to capture contextual information passively, if possible.

"There's still a temptation simply to move your online survey to mobile," he says. "Respondents are self-trained, so you don't have that cost. But, on the other hand, they'll be less giving of their time, so make it short and sharp."

There are situations, however, in which using techniques that eliminate recall may squeeze out exactly the information you want to capture, argues Steve Ogborn, director at ICM Unlimited.

"As an insurance brand, you might want to know how your customers feel about a claims process. You want to know the lasting impression," he says.

"On the other hand, if you want to understand the claims process – what was said, when it was said – you don't want to rely on recall. But one isn't necessarily better than the other."

Net Promoter Score (NPS) trackers are an example of where both methods have a function, Ogborn says. "There's relationship NPS, a slice of brand health – and that means we are collecting recall; the respondents are not thinking too hard about it because the point is, we want to measure how they feel. The other side of this is touchpoint NPS, when we collect in real time or

near-real time. We can get high volume, closed-loop recovery, and it helps with processes.

"But just because we have real-time information, it doesn't mean we understand what's going on. We still need to do longitudinal research to understand the key drivers that affect that score.

"A lot of the time we collect real-time information, but clients don't know how to use it because they don't know why the score is moving."

Also, in specific situations, recall can be a much better predictor of intention to purchase, says Ogborn. For example, a financial services company that uses ICM to track customer experience discovered that, in the first two years of a customer's relationship with the firm, touchpoint NPS successfully predicted the firm's ability to cross-sell or upsell. After two years, it lost its predictive ability. It seems the customer's accumulated recollections of the brand's performance overwhelmed the relationship. In the long run, potentially unreliable recall trumped

READING LIFELOGGING DATA

It might not be difficult but categorising tens of thousands of photos from lifelogging data is laborious, so could an expert system to take over the role of an intern be the answer?

"A lot of what we have been doing in recent years has been dealing with the loss of context from research," admits Dr Bob Cook, director of innovation and inspiration at Firefish. "The research process has evolved to become convenient for the researcher and also for the clients. It happens on appointed occasions, which are in specific places, which makes it very easy to package it up, execute it and sell it. You end up doing research way out of context, so we spend a lot of time talking to people about ideas written on bits of paper and in a viewing studio after work about a breakfast cereal."

In 2012, Firefish did a study for the Internet Advertising Bureau (IAB) called RealView, to understand how people used digital media, but without the problems of trusting their recall. It needed context, Cook says: "We wanted to measure how much screen attention the devices were going to get? How much noise and everything else is going on around that person as they're commuting? Are they squashed half to death in the Central line? You want to understand all of the opportunities, which is all of the moments our subject has a digitally-enabled device on them. So you would ask them to catalogue, in detail, every single moment of their day, or at least every interaction they have, and it's very obvious it's a completely impossible task for them to do."

Therefore 20 subjects wore cameras to capture four days of their lives. Subjects checked phones during romantic dinners, for example – the sort of behaviour they would be unlikely to recall to a researcher.

But, to discover this, there were tens of thousands of photos, which had to be categorised: if a mobile device was in the picture, it represented device use. It was a long and boring process but not difficult. In this case, Firefish's intern did the job, but the struggle made Cook wonder if it would be possible to build an expert system to 'read' lifelogging data. He turned to Cathal Gurrin at Dublin City University, the leader of a team developing cutting edge visual algorithms that can 'read' pictures.

Does it work? "It's significantly less effective than the human eye at the moment," Cook admits, "It depends what you're looking for. Objects like PCs and smartphones and tablets look fairly similar so they're quite easy for the computer with the algorithm to learn."

The trade-off is that the results are less accurate, but potentially have far more impact, because the volume of data ceases to be a constraint. Longer, larger lifelogging projects would be possible, analysed in near real time automatically.

"I don't think it'll be in the next year, but in the next five years the algorithm recognition technology we're using will become genuinely fit for purpose," Cook says.

‘objective’ measurement as a business driver.

Extract meaning

Collecting data about what respondents choose, do or buy, using passive techniques, is as old as the Dustbin Audit – the Attwood Survey first started rooting through the bins of British consumers every week in 1948; the struggle to extract meaning from the data has been going on just as long.

Collecting data using biofeedback presents methodological problems that are at least as difficult, because we need to both measure the phenomenon and interpret it.

Measurement is a technical problem, and interpretation risks reintroducing bias and post-rationalisation through the back door. For example, we can measure blood flow to areas of the brain, or conductance (see Pg35); however, understanding what that may imply is much more complex.

The problem, again, is one of inferring intention from actions. In 1949, the philosopher Gilbert Ryle first wrote of the “ghost in the machine” as a way to criticise our inadequate knowledge of how the mind and body interact.

In market research terms, we can measure a person’s brain activity, sweat, pupil dilation or where they are looking and for how long – but this is not the same as knowing what this activity means.

Visuality has tested shopper experiences and POS for, among others, Morrisons (for which it filmed, processed and analysed 10,000 full customer journeys), Asda and GSK. Its culture has always been to observe shoppers in context – stopping them to ask their opinions during the shopping trip, rather than relying on recall without context. It has recently started to use eye tracking, but with caution, says research director Nicola Scrafton.

“It needs to be used alongside other methodologies and also the experience of the researcher. I’m very sold on that. In the wrong hands, with limited knowledge, it can be quite misleading,” she says,

“You could look at fixations, and at the communication on a piece of point of sale, something that seems to be attracting a lot of attention. It could hold someone’s fixation for a long period of time. When I say long period, I’m talking two, three seconds – or people could keep going back to it. You have to interpret whether they find it totally engaging, or it’s confusing and they are trying to work out what it is. They are two very different messages that you could feed back to the client.”

> “Using technology to capture context can bring us closer to the consumer or respondent, but never eliminate subjectivity completely”

While eye-tracking glasses provide a rich source of data, for Visuality, this is both to complement insight and originate it.

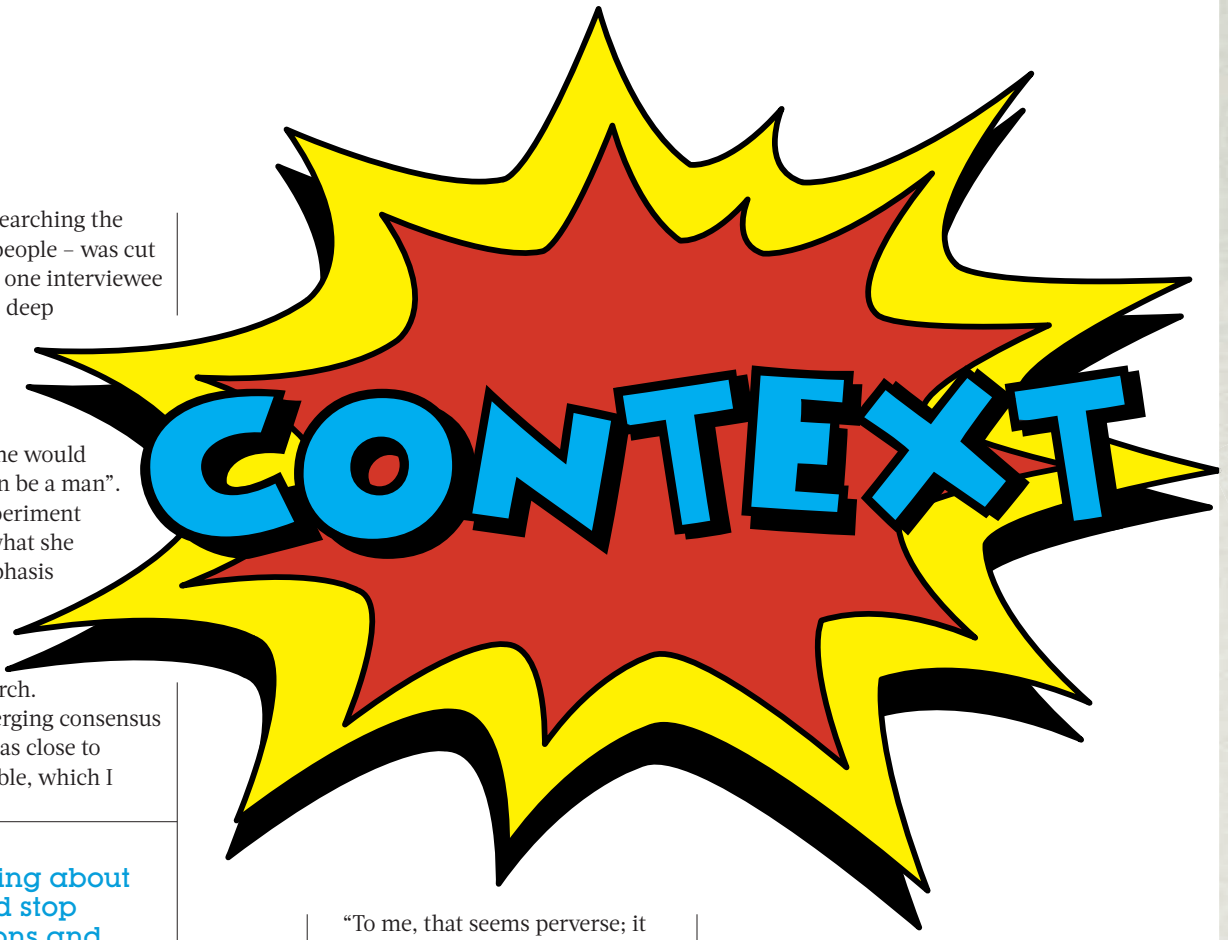
“Our bank of shopper experience and knowledge was very important to us when taking on eye tracking, because we thought about how to use the tool, rather than just thinking about how to generate heat maps,” says Scrafton.

Using technology to capture context can bring us closer to the consumer or respondent, but never completely eliminate subjectivity: even the choice of what to measure is subjective. Therefore, the jump from the ‘what’ to the ‘why’ will never be straightforward.

In a series of deliberately provocative videos posted on YouTube in 2014, Thinktank partner Sabine Stork demonstrated the tool that she believes is still best for measuring people in context: conversation.

Thinktank researchers set up some tables in Brixton Market, and then offered glasses of wine to passers-by, who often sat down in groups of two.

The method deliberately ignored the usual researcher-respondent relationship. It was a free-flowing conversation in which the researcher was an equal participant. For this group of young people, Stork says, the formality of the research process – which created problems getting authentic responses,



especially when researching the opinions of young people – was cut back. In the videos, one interviewee gleefully reveals his deep loathing of some of his Facebook friends using a four-letter word. Another says that she would "rather be dead than be a man".

Stork says the experiment was a response to what she sees as an over-emphasis on data and structure, arising from the use of technology in research.

"There is this emerging consensus that we need to get as close to consumers as possible, which I completely and utterly have no problems with," she says. "But I was reading a lot last year about how we should do this by stopping asking questions completely, and we should just observe.

> "I was reading about how we should stop asking questions and just observe. That seems perverse – treating consumers as lab rats"

"To me, that seems perverse; it means we are treating consumers as lab rats.

"I was wondering whether it all came from the data people, who really don't want to engage – they are much more comfortable observing people from the safety of a computer screen."

Interpretation

The evolving technology that allows us to measure accurately – but also efficiently – in context, may often deliver insight quickly, inexpensively, and at scale.

However, Stork warns that data-acquisition tools will only be one aspect of intimate, context-aware research.

"The danger is, I think, that there is a suggestion that the data doesn't lie," she says, "but there's always going to be the question of who's interpreting that data."

FACIAL CODING

In 2014, Nickelodeon wanted to measure its viewers' screen life, their perceptions of ads, and their level of engagement. One problem: the viewers were kids

How would children articulate their thoughts on advertising? "The majority of existing research methods require children to think and categorise their thoughts, which can result in a claimed post-rationalised view, rather than a true representation of how they feel," says Alison York, research director, Nickelodeon UK & Ireland.

Nickelodeon turned to John Habershon, director at Momentum Research, who had developed a facial-coding application for testing response to video in adults. "Asking people how they feel about an ad is unreliable. People can't accurately recall their feelings; facial coding measures the emotional response as the ad is being viewed," Habershon says.

Momentum records the tiny, split-second emotional responses, which are the most powerful signals of when the children are engaged. "In its computerised form, this is a well-established technology in the US, used for ad testing by many of the major advertisers," Habershon says. "This is done by webcam, and analysed using computer algorithms, to identify key points on the face and track their movement, to identify an emotion."

Instead of computerised recognition, Momentum films smaller samples on HD and analyses them using trained human-facial coders. This means the client can determine which emotions they want to look for.

Nickelodeon interviewed pupils at their primary school, asking two at a time to watch ad breaks on a laptop. At the beginning and the end, they were asked about their viewing habits.

The technique had never been tried with children before, but Habershon says it "was surprisingly easy… the client knows precisely when content is engaging the viewer and when they switch off. They can see at a glance how successful each ad is in comparison to others."

TRINITY McQUEEN
Sponsor

The BBC reaches audiences far and wide, and has to deal with enormous quantities of data. How is research helping the public service broadcaster to keep up with the pace of technological change and understand what its divergent viewer base wants? By **Lucy Fisher**

POINTS OF VIEW

Much has changed in the media landscape in 15 years, as James Holden, director of marketing and audiences for BBC News, has seen first hand. During his time at the public service broadcaster he has witnessed how research has become increasingly complicated – and data-heavy – since the digital world exploded.

"There's a veritable tsunami of information now," he says. "You can bombard people with data. Before, it was TV and radio, and we were dealing with currencies that were less open to interpretation."

Yet Holden points out that the research challenge at the BBC remains the same now as it was in 2000, when he first joined: to provide an audience context to aid strategic, editorial and tactical decisions. He believes that a focus on the sheer pace of change can be dangerous and it's important not to underestimate the impact of it all.

"Sometimes people jump on the next big thing, but they don't see the actual shift in consumer behaviour. For instance, around a third of UK adults use a tablet. These have really changed how audiences watch television. People are using their tablets to enhance their viewing and to create new viewing occasions," he explains.

Almost more interesting, in Holden's view, is the rise of mobile on a global level and the varying ways in which channels are used in different countries. To this end, the BBC operates an international panel, Global Minds, made up of 10,000 people from more than 180 countries. This panel provides insight that is fed into editorial, design and strategic decisions made across BBC World Service Group.

Last year, BBC News also ran four pilots on WhatsApp, WeChat, BBM

and MXit to understand how audiences in specific countries are using such 'chat apps' for news consumption and discussion of events. "Many countries are truly digital-first from a research and marketing point of view, and are using mobile in some very different ways; for instance, private chat-apps groups are discussing news away from prying eyes," Holden says, pointing out that social, political, cultural – and, of course, technological – factors make for very different research environments.

Personalising content

When he first started at the BBC, Holden says online was a "tiny" fraction of his remit, and the broadcaster had only a fledgling analytics team. It is currently looking to significantly ramp up its investment in data analytics and is working on a large-scale personalisation project, known as My BBC, to deliver personalised content on a massive scale.

"Technology is offering huge opportunities," he says, pointing out that My BBC is about product curation. He describes the project as a "huge" investment for the media giant, which is so often under attack for potentially under-serving segments of its audience.

"Digital media enables choice and personalisation like never before," Holden says. "It's an opportunity for many of our audiences to find more of our content that they may not be aware of, and may really like."

Various tools are being harnessed to help with this wider goal of greater audience insight provision and targeting. The Audiences Portal, for instance, was set up 10

AUDIENCE AGE – IT'S ALL IN THE MIND

David Bunker, head of audiences at BBC Television, leads a team of 20 people covering audience research and planning across its four national TV channels – BBC One, BBC Two, BBC Three and BBC Four. He explains that the organisation has recently undertaken some research to help it quantify the notion of perceived age versus real age – or the age that people 'feel' and how this translates into media consumption habits.

"We did some work on age in 2012 in the UK, as it was a debating point at the time," he says. "The question had been raised as to whether the BBC was doing enough for old people.

"What we found was that age is not a descriptor. With the over-65s, there were people who, in their heads, were much younger than that. And among some 19- or 20-year-olds there were people who felt very 'settled', who felt older than their real age."

"We found that often somebody in their late teens or early 20s feels older than they are, then, around age 30, they feel the same age as they are. Then there's a divergence, a gap between real and perceived age," he says.

This translated into media-consumption habits, with Bunker claiming that the notion of perceived age helped to explain some behaviours.

The BBC World Service developed the work further last autumn, running a panel in 15 countries. This led to the discovery that the overall pattern was similar in all countries.

Approximately 7,500 surveys were competed online, with an additional 1,590 people from the BBC's Global Minds continuous panel asked for their thoughts on real versus perceived age. The gap was found to be greatest in those older than 75, with generally a decade or more in terms of difference in individuals aged 55 or older.

"Simply looking at demographics, age, sex or social grade, can be quite limiting," says Bunker. "Saying someone is 45 doesn't tell you a lot about them. The work was about understanding people better, to allow for better content targeting."

Indeed, with the BBC World Service aiming to double its global reach, it is hoped that this work will help achieve this goal. To this end, the research was not focused on uncovering 'interesting' insights, but on delivering actionable suggestions to improve programming decisions.

Kevin Cowan, insight manager at BBC World Service Group, claims that age perception is a "very useful" way to segment a market. "It is simple for people to understand, but also a very powerful way of defining an audience," he says.

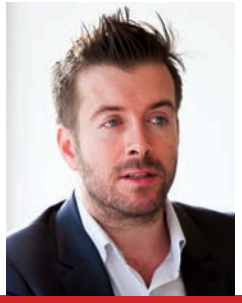
years ago, but has grown massively, according to Holden. It is now used by thousands of people across the BBC every week to understand how their programme or service is performing, and to get direct audience feedback. It also provides insight into audience behaviours, says Holden, and shows that trust and appreciation are major considerations for the public service broadcaster, which cannot base decisions on eyeballs alone.

Audience appreciation

"We need a nuanced understanding," Holden explains. "We need to be seen as trustworthy, impartial and high-quality." He also claims that the audiences function has been at the heart of the charter review, and that he has found that "reassuring".

An ongoing, daily panel – which delivers scores for audience appreciation – was set up during Chris Mundy's tenure as director of audiences at the BBC during the 2000s. Now managing director at Clearcast, the organisation that pre-approves UK TV advertising, Mundy explains that the use of an online panel was seen as controversial at the time. "There were questions around whether or not this was representative," he says. Clearly, the world has moved on.

Mundy believes the greatest challenge today, in terms of market research more broadly, is that it's not as fashionable as big data. He also thinks the assumption that everything can be measured is dangerous. "Just look at Tesco and the troubles it faces, despite having the ClubCard. Pure quant data is clearly not the answer," he says. "You need to have a rounded view, and as a researcher you need to make an impact."



> "There is no lack of data, but insight is something else. In that sense, the challenge has not actually changed in 30 years"

For that very reason, Holden says the BBC has focused particularly on training around data visualisation and storytelling skills for its audiences team, to ensure it can communicate confidently, and provide compelling justification for action when insights are uncovered. "There is no lack of data, but insight is something else," he says. "In that sense, the challenge has not actually changed in 30 years."

The BBC-wide audiences function went through a roster process late last year – a process that happens roughly every four years and which is designed to ensure its agencies are offering the right blend of skills in today's world.

Like Mundy, Holden notes an increased focus on quantitative data, and says the BBC is now looking for a broader range of skills than it would have been 10 years ago – to encompass areas such as digital analytics expertise, CRM knowledge, social media marketing skills and second-screen insights.

Jonathan Lakin, CEO of technology company Intent HQ – an audience intelligence platform that focuses on social and behavioural activity – adds that a key challenge for the media lies in ensuring it leverages the right tools and metrics for measurement. "The focus, historically, has not been on the audience per se, but on driving clicks," he says. He believes that this is changing, if slowly, and that it needs to.

And Jacky Parsons, a director at agency Sense Worldwide, which has worked with media owners such as ITV and Discovery, points out that while the packaged goods world is streets ahead of the media world in terms of building customer segmentations based on occasion or need, she believes there will be a fundamental shift in approach from media organisations. "There's a trend now toward looking beyond demographics," she says, "at shared needs, interests and attitudes. These are sometimes called 'moods and modes', and they can be a challenge for people to measure."

It is perhaps unsurprising, then, that Nick North was hired last September to fill the position of director of audiences at the BBC, after Holden moved into the director of audiences and marketing role at BBC News – an international role. As former global lead for media and entertainment at GfK, as well as head of innovation in audience measurement, North has focused on this area of audience measurement for some time.

Engagement and inspiration

North believes that media owners in general, and the BBC in particular – because of its public service remit – need to focus on "engagement and inspiration". He notes, too, that the recent roster highlighted the much broader range of skills needed in today's market research world, with a number of new agencies having made the - extensive - list.

He also points out that the BBC's appreciation panel can now be "supercharged" thanks to the potential to integrate social media monitoring tools. North stresses the need for enhanced analytics capabilities, but not at the expense of more traditional market research techniques that can

help to explain the 'why' behind certain decisions or actions. Observational, ethnographic techniques, he adds, can help to paint an accurate picture of how audiences navigate toward content, how they scroll and find it.

"There's a danger in getting too caught up in numbers of 'tweets' or 'likes'. It's very important to know what you're trying to measure," he argues. "Volume is often not enough. Consider sentiment analysis and be conscious that word-of-mouth is one of the most powerful tools driving future viewing or listening. Remember, too, that the vast majority of word-of-mouth is offline. Online does not represent the whole audience."

That said, the recent 30th anniversary of *EastEnders* this February generated a huge amount of activity on social media, thanks in part to what North describes as a "big reveal" of who killed character Lucy Beale. The online conversation underscored the growing importance of dual- or multi-screening behaviour, and the often symbiotic relationship between television and social media.

"Our measurement of the episode's performance was truly multi-platform," says North, who describes the level of social engagement as outstanding, claiming that it was the most tweeted about episode of a UK soap.

New opportunities

"It demonstrates how important some of our biggest brands are across social media," he adds. "It is about us pointing the way towards new opportunities. I think it demonstrates the scale of what can be achieved and how one amplifies the other when it comes to broadcast reach and social media."

> "There's a danger in getting too caught up in numbers of 'tweets' or 'likes'. It's very important to know what you're trying to measure"

While post-event reporting and analysis is a significant part of what the BBC's insight specialists are responsible for – in part because of the public service broadcaster's need to be accountable – North says that, increasingly, the focus lies in supporting content creators to feed in 'inspiration', as opposed to analysis post-broadcast.

North also says the My BBC personalisation project is one of the most exciting areas of focus for the BBC's audiences function at the moment. "We'll start to see how consumption behaviour can influence which headlines are brought to the surface," he says. "We could effectively offer a million different experiences of the BBC, not just one homogenous experience. It's an opportunity to engage directly."

Meanwhile, Holden – with his news hat on – adds that plurality of news provision is a "good thing". He says he's not intimidated by the range of online news sources available today and argues that the role of the BBC is to offer trusted information, depth and breadth. He claims that audiences trust the BBC's offerings and often use these to verify information found from other publications across the web.

With the global reach of BBC News standing at 265m people a week, there are plenty that appear to be finding some value from the broadcaster, despite the barrage of criticism or controversy it so often faces in the headlines.

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LIZ LAMB

2015-present:
Senior director, insight and pricing, Asda

2011-2014:
Head of insight planning, Asda

2007-2011:
Head of insight and customer experience, Post Office

2006-2007:
Associate director, retail, Research International

2005-2006:
Senior manager: insight, Debenhams

2000-2005:
Head of advertising research; head of product testing; new propositions manager, online, Sainsbury's

1996-2000:
Senior research executive, Millward Brown

Shelf life

Competition in the UK grocery market has never been so fierce. Asda's senior director of insight and pricing, **Liz Lamb**, tells *Bronwen Morgan* how the supermarket intends to compete by keeping the customer at the heart of everything it does

After decades of growth, Britain's top four supermarkets – Tesco, Sainsbury's, Morrisons and Asda – have struggled in recent years to contain the threat of discount retailers Aldi and Lidl. Capitalising on consumers' penny-pinching associated with the recession, the German discounters have gained market share at a steady rate (see box, p54), while the major players continue to engage in a price war. Competition is such that there have been 18 successive falls in grocery inflation; shoppers are now paying less for a representative basket of groceries than they did in 2014.

While the market share of each of the UK's 'big four' supermarkets fluctuates, the latest annual *Brand Finance Retail 50* report revealed Asda to be the only one to have avoided a drop in brand value in the past year.

Liz Lamb, senior director of insight and pricing at Asda, believes that – while there will be "a hundred and one reasons" behind this trend – one of the key drivers is the supermarket's "single-minded focus on the customer". This, she explains, is enabled by insight.

"It's just a very aligned and focused organisation, and everything always comes back to what we're delivering for the customer," Lamb says. "If we are ever off the ball from a pricing, service-delivery or quality point of view, we're alerting people to that straight away, and action's taken off the back of it."

> "If we are ever off the ball from a pricing, service-delivery or quality point of view, we're alerting people and action's taken off the back of it"

Insight planning

"It's not the type of place where you deliver insight, and people sit around and nod and smile, and you go away and never hear about what's happened to it again," she adds.

"You instantly know it's driving action around the business."

Lamb credits this ability to turn insight into action to the structure of her department at Asda. There are two data teams – one looking at customer relationship management (CRM) activity and another at customer analytics – plus pricing, market research, and customer and market data teams. However, she believes the insight planning team is key to disseminating the insight generated by the department. Lamb is well-versed in its work; before moving into her current role earlier this year, she led that team. "It's rare in the industry to have a team that's dedicated to pulling out the insight and landing it in a commercially compelling way," she says.

> "We are being heard and are being taken very seriously. We have gone from being a support team to being a real strategic asset for the organisation"

Focused role

Asda's planning function sits as an umbrella across the other teams. The planners take the information and "try to make sense of it – sorting the wheat from the chaff", then place it at strategic points within the business.

"A lot of the success, in terms of being heard and being acted upon, is dependent on that piece of work," says Lamb.

"You often get insight managers tasked with doing so many things: agency management; data analysis; the presentation. But this team of people can just focus on that stakeholder relationship, and landing those compelling insights."

This focused role, says Lamb, means that the planning team are not only responding to the needs of the business, but are actively pointing out knowledge gaps that need to be filled.

"They have got a real ear to the ground for what's happening from a business point of view, so they can be reactive, but also proactive in saying: 'This is what you need to be focused on; you need to be hearing this; you need to be challenging teams on this.' I think that's quite an interesting place to be."

Three years ago, when Lamb joined Asda, the insight team had fewer than 10 members, all of whom were generalists. Asda decided to build a team of "real expertise" – to build data and research capabilities, then bring in planners with business, as well as insight, experience. That way, Lamb says, they could put a commercial edge on any information delivered.

Having that commercial overview is useful at any time, but perhaps even more so during times of change within a business. In recent months, there have been some significant changes to the senior team at Asda: marketing director Chris McDonough left the business in January and was replaced by Claire Harrison-Church; and chief customer officer, Steve Smith, rejoined Walmart after a two-year secondment. He has been replaced by former chief merchandising officer Barry Williams.

Lamb says Williams is "absolutely obsessed with the customer" and has been pivotal in driving that focus since he joined. However, even before then, the team had been growing steadily, as a result of hard work and its success with stakeholders.

"We are being heard and are being taken very seriously," Lamb says. "We've gone from being a support team to being a real strategic asset for the organisation. We're at all of the key meetings. More people are getting to find out about insight, and they use it – and see it – as the asset that it really is."

Understanding loyalty

A piece of work that Lamb feels contributed to the wider appreciation of the strategic value of insight within Asda is the 'Mums Immersion' project (see case study). Still going today, it was the first time the whole business had been galvanised around an insight scheme, adds Lamb. It led to other workstreams and has driven a lot of action for the supermarket.

Looking ahead, Asda's focus will be on re-engaging with existing customers, and drawing in new ones – although Lamb says she would be surprised if this wasn't every retailer's focus. It is especially important, she explains, at a time when shoppers' relationship with supermarkets is changing.

"Loyalty isn't what it was some years ago. We've got such promiscuous shoppers now and – with multi-site and multi-channel shopping – the big four are very much part of this squeezed middle. Everybody is fighting for a share of the customer's wallet," says Lamb.

"All retailers have some customers that are fundamentally more loyal than others. But then you have these floating, secondary – tertiary – shoppers, who will shop around a bit more.

"Earning loyalty in this competitive climate is harder than ever. It requires true understanding of your customers and their needs – and, crucially, delivering against them."

As part of its quest for understanding, Asda tracks customer satisfaction via instore and online programmes, and talks to 40,000 shoppers a month via its customer-perception tracker, and 20,000 via its 'pulse of the nation' customer panel. Lamb estimates that her team talks to around 100,000 people every month across all research programmes. This includes 12 families that the company has 'adopted' in the past four months, in order to understand them "as shoppers and as people outside the shopping environment".

Asda is trialling other new approaches, too. Video cameras have been placed at strategic points in a number of its stores to monitor customer traffic and flow, as well as how people interact with items on shelves. This is intended to offer insight about whether they are being distracted by things such as advertising or ▸

CASE STUDY: MUM'S THE WORD

Three years ago, Asda – alongside The Mom Complex and Breathe Research – did a large piece of work focused on mothers: The Mums Immersion. The point was to get under the skin of the Asda mum, "to understand her in and out, not just as a shopper, but as a customer," explains Lamb. "What life looks like for her: what her pain points are; where her passion points are."

The project involved members of the senior team immersing themselves in the day-to-day life of mums, with friendship-group 'opinion parties', diaries (including a pain and pleasure app that mums could use to record their life in real time) and online discussion forums. Multi-sensory immersion events were then used to deliver insights to senior managers.

Andy Clarke, Asda CEO, said: "The Mums Immersion has had a huge impact on how we think about our core customer – internally, but also externally. We launched our industry-leading *Mumdex* report shortly after the sessions. This has been a huge success."

palettes, and how their journey is being enabled – or not – throughout the store.

Lamb says the company will be looking to use behavioural economics to get under the skin of shopper decision-making. This means using new tools and techniques to explore how people are shopping, in order to optimise their experience and spend.

At a fundamental level, Lamb's team – and Asda as a whole – is using the values of its customers to inform its business.

Where other businesses might outsource their customer-closeness work, data analysis, and management of its customer panels, Asda does this in-house.

"We talk about EDLP for our customers – everyday low prices – but in order to fuel that, we need to be an EDLC business: everyday low cost," she says.

"As a team, we're doing some phenomenal bits and pieces that I think – if we were to commission an external source – would be costing in the region of £1m. We're doing it at next-to-nothing because we've got smart people around the table working on it. That's something that we're really proud of as a team.

"Even though we function with that [EDLC focus], we're more creative because of it."

MARKET SHARE THE VALUE OF VALUE

Richard Perks, director of retail research at Mintel, on how Aldi and Lidl have disrupted the grocery sector

In the past three years, Aldi and Lidl have grown their market share by 3.5 percentage points, and the majority of this gain has come from the leading superstores. While this trend will slow down, there's no sign of it stopping.

The weakest of the big four have been Morrisons and Tesco. It would be wrong to say that all of that lost market share has gone to Aldi and Lidl – because they have lost out to the others, too – but it would be fair to say they have lost the most.

Asda sees itself as the most vulnerable to competition from Aldi and Lidl, and that is probably justifiable. Our research shows that Aldi's customer base is somewhat older than Asda's, but both are lower-than-average in terms of income. The main difference is that Aldi and Lidl attract a savvy customer – one who knows there are great bargains to be had, rather than one who is purely price-focused. However, for Asda, it is essentially about price, and its current strategy is to try to bring down the price of core own-brand ranges to be competitive with Aldi and Lidl. Is it right to do so? We're not sure. The latest figures from Asda rather reinforce our view that, once one establishes a position for being cheapest – which, among the big four, Asda has – then there is nothing to be gained from being even cheaper.

To address the issue, all four of the big supermarkets need to concentrate on giving great value for money and being price competitive on the lines where they are most closely up against Aldi and Lidl.

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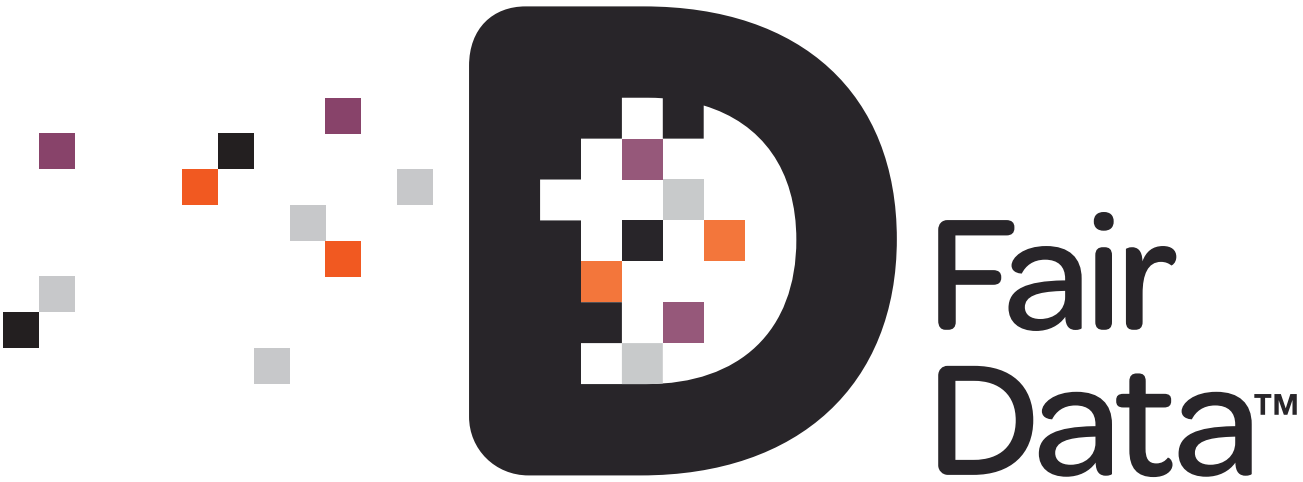

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Premium insight

Aviva's head of marketing, **Neil Costello**, talks to *Bronwen Morgan* about why customer insight affects all aspects of the business, from sponsorship to pricing

Highway robbery no longer poses a threat to commuters in the UK – at least, not in its original sense. But it was a different story in 1797, when wine merchant and banker Thomas Bignold found no-one was willing to insure him against the many highwaymen who lay in wait on the roads at the time.

As a result, Bignold founded Norwich Union, which, as well as highway robbery insurance, also offered cover against fire. More than 200 years later, that company is now Aviva. Not only the UK's largest insurer, it also offers savings and investment products, and has more than 31 million customers worldwide (see box).

Loyalty beyond price

Unlike many of its competitors in the insurance sphere, Aviva does not appear on any price comparison sites. According to its head of marketing, Neil Costello, this is a deliberate move to drive customer engagement beyond price.

"You have to give consumers a proposition over and above what they would expect to see on those sites, to make sure that the loyalty sticks," Costello says.

This could be added product extras that aren't available on an aggregator, he explains, but it also spans into loyalty propositions. The company has 'Aviva advantages' for its customers, giving them access to discounts or competitions that couldn't be accessed anywhere else.

With aggregators out of the equation, Aviva drives business via direct-to-consumer marketing – a mix across targeted media types and assets including sponsorship, TV, digital, press, direct mail and email – and business to business (financial advisers) via digital and email, with some press.

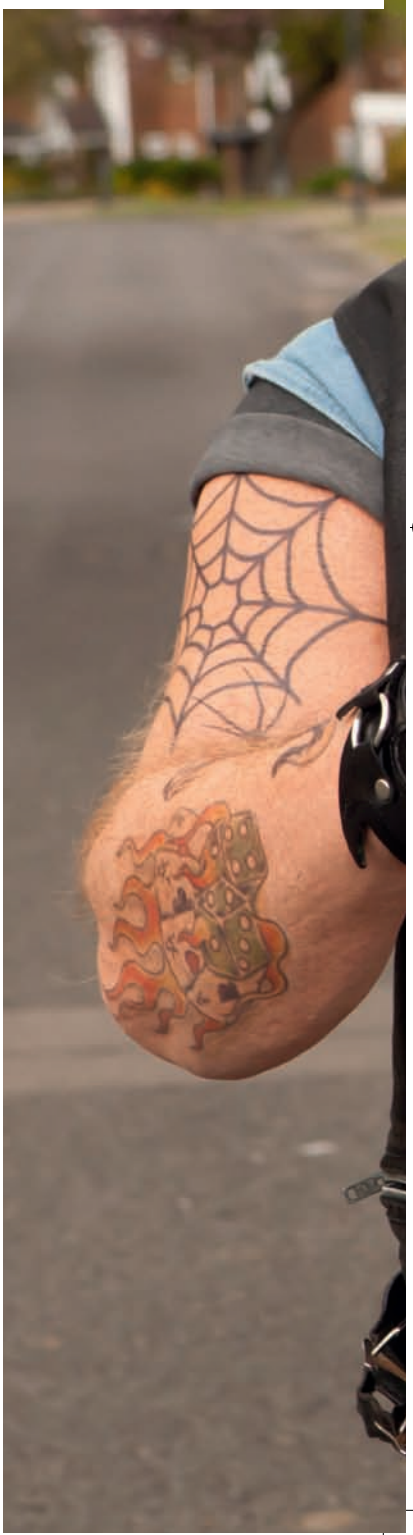
This B2B marketing is an area Costello has been keen to shake up since he took on his role around 18 months ago. Part of what has driven this is his belief that the days of heavy paid-media spend to influence financial advisers is gone.

> "What I'm most interested in is how you invest in content marketing to drive a more relevant and personalised relationship with your audience"

"I'm not that interested in a financial adviser opening a marketing newspaper and seeing a big yellow advert. What I'm most interested in is how you invest in content marketing as a discipline to drive a more relevant and personalised relationship with your audience.

"So we restructured. When I took on the role it was under the condition that we built a content marketing team."

Costello explains that, historically, the marketing team would have been structured



AVIVA BY NUMBERS

31m
customers worldwide

Operates in
16 countries
across UK & Ireland, Canada, Europe and Asia

STRUCTURE OF BUSINESS

Life insurance:
68%
General and health insurance:
29%
Fund management:
3%

(Figures sourced from Aviva website, as of 2013)

based on product expertise: for example there'd be an investments person, a healthcare person and a protection person. And while there's still an element of that, the content marketing team has been formed to be responsible for marketing automation, the development of Aviva's digital channels, and the maintenance and development of its social media channels.

As a result, Costello says, it's vital to ensure they're also measuring the right marketing metrics.

"Before I came into the role, we used to measure the impact of our advertising with financial advisers – who are independent anyway so shouldn't necessarily be getting influenced by particular adverts – and the impact of paid spend.

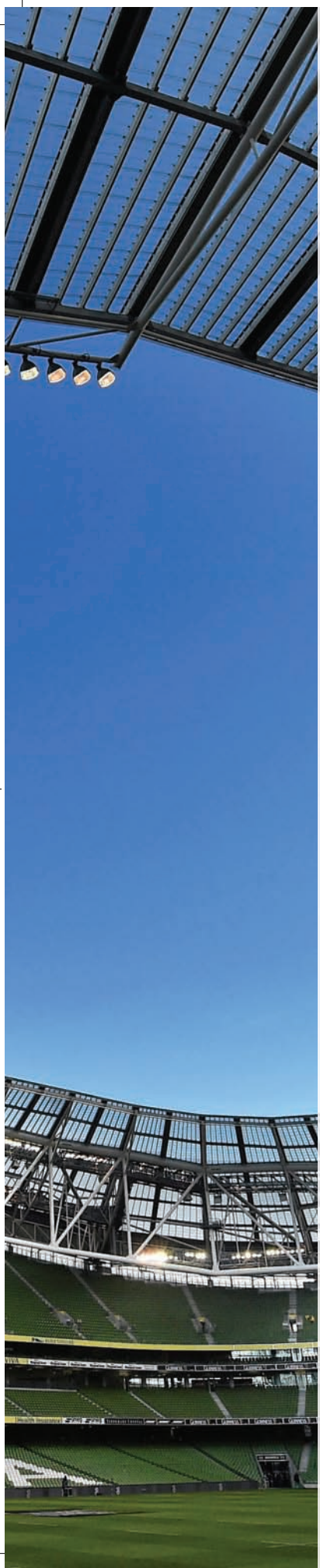
"But you've completely ignored the digital market and you've ignored the social media influence with intermediaries. And while they [intermediaries] are laggards in terms of their adoption of social media, it's getting faster with the new breed of advisers coming through.

"You've also ignored the need to provide leads to the sales team. If you've got a slick CRM (customer relationship management) system and you've got marketing automation working properly, the days of B2B marketing being measurable are probably here now, because you can quantify how many leads you're giving to your sales guys."

Reaching the consumer

When it comes to direct-to-consumer advertising, TV ads and sponsorship are the two most high profile elements in the mix, says Costello. The TV ads feature actor Paul Whitehouse, who has starred in these since 2011 in a variety of guises portraying the British everyman.

On the sponsorship side, Aviva currently sponsors Norwich City Football Club and UK



Premiership Rugby Union. But, Costello explains, research has shown that consumers' recall of sponsorship can be hazy.

"A lot of people still think that we sponsor the athletics [Aviva sponsored UK athletics until the end of 2012] and likewise people still think that Guinness sponsors the rugby – it just goes to show how long people's perceptions are influenced by major marketing spend."

This kind of insight is one of the reasons that, despite Aviva's heritage and success, the company still relies on customer research to drive its operations.

"When you see how new start-ups can disrupt a market so quickly, I think it would be remiss of any major organisation, no matter how long you've been around, not to have that consumer and digital insight at the heart of what you do," Costello says.

> "I think, whatever sector you're in, how you analyse and get insight from big data is where the battleground is"

And Costello, who has been with the company since 2005, is particularly aware of the importance of insight within Aviva. His previous position at the company, as head of UK research, saw him lead all primary and research activities across all categories.

He firmly believes this stint in a research role has made him a stronger marketer.

"I think it's really important that if you want to be a marketer – and I include research in the marketing stable – if you want to progress within an organisation, the more rounded you are in terms of multi-discipline, the better."

The benefits of his research experience, Costello says, also extend to helping him appreciate the nuances of commissioning and carrying out research, as well as giving him an awareness of different research approaches.

"I had a relatively short time looking after the research team, but in terms of opening my eyes to the different types of capabilities, whether that's neuroscience, behavioural economics, visual techniques, NPS data – all that kind of stuff – it just makes your opinion a lot more credible, I think.

"What's more, when you're commissioning research with the research team itself, I think it's vital you understand that altering even just the tone of voice or positioning of a question for a consumer, whether that's online or in a face-to-face environment, can skew results enormously."

The benefit of that experience can go both ways, says Costello. He actively encourages researchers to "test their mettle" in one or two disciplines other than research, to ensure they understand how their findings are applied into the business.

Long-term relationships

But the particular challenge for researchers within the centralised research functions of big multi-product, multi-channel organisations like Aviva, he explains, is to maintain credibility when they have to provide such high levels of technical analysis alongside trend analysis in the digital and consumer space.

This means that researchers Costello works with need to maintain a high level of product or channel expertise that will never be the strengths of all. "You'd expect a product development or a proposition expert to be the oracle for it, but the research guys need to be all over the digital and consumer trends, so that, when you marry your research findings with them, you really do provide genuine insight back into the organisation, rather than just replaying facts."

This need for expertise extends beyond the internal research team and into the insight agencies that Aviva partners with. Where a marketing agency relationship may last a few years, Costello says, a research relationship will generally last a lot longer.

"With research, you have to have a core set of agencies with a level of expertise and understanding of your market. Those relationships are probably some of the longest relationships we have in our broad marketing stable.

"In the marketing agency landscape I think it's important that you continue to look out there at creative approaches, particularly in the digital environment, every two to three years or so. A research relationship would generally last a lot longer as long as both sides are comfortable with the roles they're playing."

And in a highly regulated market like financial services, research is a vital part of decision-making.

When it comes to product development in particular, everything must go through a strict consumer testing process to ensure that it is linked to the needs of the target audience. But ▸

that regulation also means that Aviva must exercise caution in the way it uses its research findings.

Subliminal influence

For example, Aviva has recently been testing neuroscience techniques, including measuring the neurological response to the narrative of a life insurance campaign to understand emotional and brand-related responses.

"You have to be very careful about how you deploy those kinds of techniques in financial services because, given the very important nature of the regulation that surrounds our sector, to be almost subliminally influencing a consumer is not acceptable," says Costello.

"While we do testing around neuroscience, I'd say we're far from the space of that kind of subliminal influencing."

But Aviva does use customer ratings and review techniques in its general insurance category – soon to be extended to the life insurance and investment categories too, "when the time is right". This idea of allowing customers to review the company's service propositions has an element of behavioural science to it, Costello believes.

"There's a mass peer opinion that takes you away from just reading an expert's view in a magazine," he says. "We've all been on Trip Advisor and been influenced by the opinions of people who may not even have expertise in that space."

The influence of peer review is perhaps even more pertinent when you consider the type of relationship that financial customers have with a brand; committing their hard-earned savings to an investment or pension over the long-term means they're looking for qualities like credibility, heritage, expertise and a good track record. The trick then, Costello explains, is to do a lot of testing to work out where a brand can sit from a price perspective.

One segment particularly influenced by price, but often locked out of the market by it, is young male drivers. They are one of the targets of Aviva's new app, Aviva Drive. The app allows a personalised price based on behaviour, meaning that Aviva can lower premiums for some drivers based on their driving. While this personalisation is important, and there's an element of gamification in a scoring mechanism based on driver behaviour, perhaps the most crucial part is that the app gives Aviva access to regular data. And when is there ever a discussion about research these days without it turning to big data?

"I think, whatever sector you're in, how you analyse and get insight from big data is where the battleground is," says Costello. "From a marketing perspective I don't think it's harnessed yet. I see marketing automation technologies that are clever at pushing out freemium content to get consumers to trade their data with you, but that's still relatively unsophisticated.

"The level of targeting that goes on in the digital marketing environment is moving at pace, but the sheer level of data about consumer behaviour and how you genuinely harness that to the value and the benefit of the consumer – that's what's really challenging." ∎

CV
NEIL COSTELLO, AVIVA

Nov 2013 – present: Head of marketing

Jan – Nov 2013: Head of UK research

Jul – Dec 2012: Head of customer innovation & experience

Nov 2011 – Jul 2012: Head of marketing planning, UK Commercial

Dec 2010 – Nov 2011: Customer development manager, UK Life

May 2008 – Dec 2010: Marketing planning manager, UK Life

May 2006 – May 2008: Portfolio manager, UK Life

Oct 2005 – May 2006: Portfolio manager (Investments & Pensions)

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CULTURAL SEGMENTS

THE ROLE OF SEGMENTATION IN MODERN BUSINESSES IS "FUNDAMENTALLY CHANGING", ACCORDING TO A PANEL OF INDUSTRY EXPERTS, GATHERED AT SONY MUSIC'S KENSINGTON OFFICES. THE DAYS OF MODELS BASED ENTIRELY ON LONG, REPETITIVE CONSUMER SURVEYS ARE NUMBERED, AS SONY'S **MARTIN VOVK** REPORTS.

With businesses looking to mine their transactional databases and other sources of real-time behavioural data for richer insights into their customers, it's increasingly apparent that the traditional segmentation model must evolve and adapt to stay relevant.

While many of the industry experts who gathered at Sony Music's offices reported that they had explored the possibilities of segmenting based entirely on behavioural data – with varying degrees of success – most agreed that the ideal segmentation of the future would be a hybrid of traditional and modern methods.

Added Value's Paul McGowan says his clients are "intrigued and apprehensive" about the use of big-data approaches to segmentation – excited by the possibilities, but wary of "deficiencies in developing diagnostics around why people do what they do". For McGowan, behavioural information is only "one part of the story"; the ability to take new sources of data that explain behaviour, and interrogate them to identify reasons and rationale, is going to become an essential skill for any research practitioner.

Mark Uttley, of music-streaming service Spotify, has perhaps more reason than most to be intrigued by the possibilities offered by the new, data-rich world. Having pioneered a successful segmentation, based on survey data, at Sony Music in the mid-2000s, he now finds himself surrounded by an ever-expanding wealth of behavioural data, which opens up a huge range of opportunities for understanding consumers.

Even for data-driven Spotify, traditional, survey-based segmentation is still viewed as having a role in making sense of the numbers, but that role is changing. Big data offers the possibility of solving a problem that has always faced those creating segmentations – immediate obsolescence of the collected data.

"Where it's going now is that segmentations have to be real-time – you have to be able to see the immediate results of the actions that you've taken. That kind of real-time view is the Holy Grail... and something we weren't able to do while I was at Sony Music," Uttley explains.

Mark Mulligan, music industry analyst, agrees. "In technology, the rate of adoption is accelerating; people are being exposed to more and, therefore, changing behaviour more quickly than ever. Think about the growth of Facebook, particularly on mobile – that has raised the digital IQ of everyone in the space of a few years. The rate of change means segmentation has to be more flexible."

Cultural anthropologist Dr John Curran goes even further, suggesting that it's not just how people change over weeks and months that needs to be looked at, but how people perform different roles even within the course of a day.

"Segments should be positioned less as 'given facts' within a business and more as 'ideal types'," he says. "They have certain cultural codes. Segments are cultural, and how they're defined and designed is also cultural. If a segmentation model is too rigid, it leaves little room for fluidity or for creativity.

"We also need to look at how people move between segments – because that's what humans do. I'm very different now to when I'm on the stands at Crystal Palace Football Club. It's about being able to track those emotional and cultural touch points."

Darren Whiting, of Sony PlayStation, posits that segmentations need to be multi-dimensional and adapt to the task at hand. "If you think of the funnel, segmentations work great in terms of high-level planning, but – when you get down to one to one – they start to crumble. That's where behavioural data comes in; it's a lot more reliable and realistic."

In Whiting's organisation, hooking up segmentation with big data is already having a real impact on the business, in a way that traditional, survey-based segmentation never could. "As a networked gaming platform, we're quite data-rich, so we're starting to understand not just what people say, but what they do," he says. "We're starting to assign people to segments predictively when

ATTENDEES

Doug Dunn, chair
Chris Carey, founder, Media Insight Consulting
Patrick Collins, research manager, BBC Radio 1, 1Xtra, Radio & Music Multi-platform
Andy Crysell, founder/MD, Crowd DNA
Dr John Curran, CEO/founder, JCIS
Paul McGowan, CMO, Added Value Group
Mark Mulligan, co-founder & analyst, Midia Consulting
Shawn Paltiel, senior insight manager, Sony Music International
Colin Strong, managing director, Verve Ventures
Mark Uttley, global head of marketing insights & analytics, Spotify
Martin Vovk, senior insight manager, Sony Music UK
Darren Whiting, director digital marketing & CRM, Sony Computer Entertainment Europe

> "Attitudes are great for helping you understand someone; however, the business is pretty much driven on numbers, so – unless you have behavioural data around value and numbers – then it's very hard to take it beyond conceptual marketing."
>
> **Darren Whiting, SCEE**

they sign up to the platform. For us, segmentation is no longer this abstract planning tool that falls apart when you try to use it in other parts of the business."

For Uttley, research suppliers offering segmentation in 2015 need to shift their mindset towards the synthesis of multiple data sources, by exploring the possibilities of the combination of traditional and modern methods. "The suppliers that win in the future will be the ones that join up data sets and start driving segmentation from behavioural information," he says.

EMBEDDING SEGMENTATION

While the methodological framework of segmentation may be facing new and exciting challenges, the evergreen issue of engagement is still taking up a lot of thinking time. All the experts agreed that it was vital to extract the maximum information from the right data sources, but – in the words of independent consultant Chris Carey– "If your stakeholders don't use it, it's all useless anyway."

For McGowan, creating a segmentation is only the start of the journey. "The segmentation solution itself is, at best, 40% of the value. Some businesses stop with that: you create a debrief, share it with the marketing team, they look bored and you move on. The job of embedding the segmentation and ensuring that it drives business decisions – that is the difference between a segmentation that becomes part of the bloodstream of the business and one that doesn't."

Uttley offers some tips for embedding segmentations in an organisation, arguing that the most successful programmes involve a degree of "insight letting go of insight" and devolving responsibility to those who are best placed to ensure its effective use in business. "Attach segmentation to the forward-thinking people within an organisation," he says. "Use it on specific projects based on the ones with the highest potential for success. Write those up and showcase them to the rest of the

business – show them the results, the creativity and the awesomeness that came out of these projects. When you're not forcing it down people's throats, but using an incremental, results-focused approach, gradually it becomes part of the culture."

Andy Crysell, of Crowd DNA – whose 'UK Tribes' project for Channel 4 exemplifies, for many, the successful embedding of segmentation within an organisation – says engaging stakeholders is increasingly critical in terms of effectiveness.

"The challenge for us is not just providing pretty content that's purely journalistic, but making it interactive," he says. "How do we allow the stakeholders to create the content themselves and give them a sense of ownership? There can be really quick fixes – such as asking your team to take a different route to work every day, to encounter different segments. Storytelling is really important – getting the teams telling the stories themselves is where it really takes off."

Whiting argues that the work up front is just as important, suggesting too many segmentations can feel like 'research projects' rather than 'business projects'; "when the research team thinks it's got something great, and keeps trying to shove it down everyone's throats, but it's not actually engineered into the business process. Getting that right is about designing it, ahead of time, to fit in with those business processes," he says.

Colin Strong, of Verve, suggests many segmentations fail at this stage because they try to be too wide-ranging, and don't focus on providing solutions where they are actually required. "It's very easy to think that a segmentation is uncovering an impartial, objective view of the world – but it ain't! It is one view, and there needs to be more recognition of that," he says. "Having an open discussion with stakeholders about what it's hoping to achieve is important, otherwise you end up with something that's trying to be everything to every part of the organisation, and that doesn't really work."

COMMON THEMES

Big data and cultural engagement were the hot topics of discussion, and it's not difficult to make connections between the two. The common thread is the need to make segmentation live and breathe, and not simply sit as a static document on a shelf or hard drive.

Embracing the analysis of behavioural big data opens up the possibility of a shifting segmentation that is never finished and always evolving, which truly reflects the fluidity of human nature and personality. Yet, without the guiding hand of the expert to interpret this new kind of segmentation and bring it to life, it amounts to nothing.

Spotify's Uttley says: "The job of the agency is going to change from creating segmentations based on surveys. The role of agencies – especially those forward-thinking ones that are employing journalists, ethnographers and designers, alongside traditional number crunchers – will be in bringing segmentations to life and helping to engage organisations culturally with segmentations.

"The data we have at Spotify gives us incredibly sophisticated analytical capabilities, but it still absolutely needs that cultural overlay."

> "You've got to design processes that take people outside of their comfort zone. Get them to live a day in the life of the segment and they'll still have preconceptions about who that segment is. Get them to share those preconceptions and then meet the segment; they'll come back saying 'I was completely wrong'. When they see the whites of the eyes of the consumer, and realise how their preconceptions could have let them make certain decisions, they might make better ones as a result"
>
> **Mark Uttley, Spotify**

Burden of proof

FINANCE DEPARTMENTS ARE USED TO STRUCTURED MENTAL MODELS, AND COMBINING RESEARCH METHODOLOGIES CAN BE THE BEST APPROACH FOR IDENTIFYING BRAND VALUE, SAYS BRAND FINANCE'S **ANDY MOORE**

Throughout my career, I have been surprised – and occasionally frustrated – by the different burden of proof that is applied to marketing compared with other disciplines. When I worked at organisations such as Mars and PepsiCo, this wasn't too much of an issue. The core assumptions were that strong brands, creatively marketed with strategic intent, were critical engines for growth. While there was a great deal of rigour applied to validation of brand-investment business cases, using sophisticated modelling and research methods, the default view across the business was that brand mattered.

Working with Brand Finance over the past couple of years, I deal regularly with finance and tax professionals who seek to quantify the contribution that brands make to their business. What is most striking is their different starting-point assumption of measurement.

While there are still a few 'old school' types who think brands are too nebulous a concept even to attempt to measure, the majority want to separate their contribution to the business with a degree of precision that matches the apparent accuracy of the profit & loss (P&L) or the balance sheet. (I say 'apparent' because we all know that a P&L can be a work of creativity!)

Therein lies the rub. Marketers, in general, aim to create a whole that is much more than the sum of the parts – elements that work synergistically to project a desirable image, claim a premium positioning, satisfy underlying needs better than the competition, provide valuable features or services that people will pay for, and strip away unnecessary features that don't influence demand. It is essentially a multiplicative mental model.

The requirements of the finance function when it comes to brand are typically underpinned by an additive assumption, seeking to disaggregate the brand

contribution from other business drivers, such as technology, licences, customer database and salesforce power. This disaggregation can, at first sight, seem at odds with the synergistic instinct of marketers. However, it is precisely this ability to identify and quantify which elements contribute, or don't, to brand and business performance that our finance colleagues desire most.

All too often, though, their exposure to research has been limited to the descriptive outputs of the latest wave of a tracking study – with its weak signals and absence of conclusion – or the interesting, but hard to grasp, summary of qualitative research, the presentation of which is at variance with the way they have been trained to process information.

Fortunately, market research can help bridge the gap between finance and marketing, particularly through methods such as quantitative drivers analysis or conjoint analysis. Such techniques, while nothing new to researchers – and long a part of the armoury of good marketers – have always been a key means of validating and modelling brand effects and, for certain types of product and service brands, identifying which elements of brand proposition influence business performance. These methods are by far the most likely to be acceptable to the world of finance, and are typically favoured by them and the management consultancy firms, as they fit best to their structured mental models of how things work.

The non-functional aspects of brand strength cannot be so easily disaggregated, but careful and sensitively designed research can, nevertheless, provide a way to attribute price premium or other aggregate effects due solely to brand.

The burden of proof for brands is perhaps at its greatest when tax authorities are involved. The recent discussion relating to brands such as Starbucks and Amazon highlights the challenges involved in identifying how much a brand is contributing to a business and, therefore, which brand royalties and transfer prices are legitimate and defensible to those authorities.

This is an increasing area of work for us and, by developing methods that combine conjoint studies, brand drivers research and sophisticated financial analysis, we have found that the contribution of brand can be clearly isolated and demonstrated – even to those who approach brands with a sceptical eye.

Market researchers can, and should, get on the front foot more in explaining to non-marketing audiences the power and value of such approaches in aiding business decision-making. In particular, it is still the case that many finance directors have very limited knowledge of what correctly configured and analysed customer research could do for them in assessing value and contribution of brands, despite this being the primary way of assessing, in a quantified fashion, a key asset of the business. In an age of marketing accountability to the boardroom, this remains an opportunity for those who can bridge the gap. ■

Andy Moore is insight director for Brand Finance

MORE THAN SKIN DEEP

DIGITAL DEVICES ARE NOW SO INTEGRAL TO OUR LIVES THAT THEY HAVE EFFECTIVELY BECOME AN EXTENSION OF OUR BODIES. BUT AS TECHNOLOGY ADVANCES, COULD THESE ELECTRONICS BREAK THE MOST PERSONAL BARRIER AND MOVE UNDER OUR SKIN? BY **BRONWEN MORGAN**

SELF-EXPRESSION

Wearables could be a living tattoo

It takes the average person 2.3 seconds to enter the passcode on a smartphone, something they typically do around 40 times a day. This is the equivalent of 10 hours every year spent unlocking a digital device.

For the time-poor, there's now the option to unlock a phone using a fingerprint – a function available on the latest iPhones via Touch ID – and some Android devices. Touch ID can be used to make iTunes purchases and, in recent months, has been extended to allow customers of some online banks to log into their accounts. While this, technically, is an interaction between body and device, the technology enabling it remains firmly away from the body. Could that be about to change?

US company VivaLnk has developed a range of digital tattoos that achieve the same effect as the Touch ID, but using technology that sits on the surface of the skin. Its eSkin tattoos are ultra-thin, transferable, near field communication (NFC) tags that allow wearers to interact with their smartphones: unlocking them, opening apps and interacting with functions, such as email and music, with a swipe of the wrist.

Similarly, last year, Google and pharmaceutical company Novartis teamed up to produce 'smart' contact lenses. These monitor blood-sugar levels in diabetics via a sensor that relays data on the glucose contained in their tears. The information is transmitted via an antenna that is thinner than a human hair. According to Jaeha Yoo, director of experience design at agency New Deal Design, the company that pioneered wearable technology with the Fitbit, there's only one direction to go from here.

"I think that as we become more

Ultra-thin NFC tags can communicate with smart devices

intimate with our electronics, they will make it into the body in a very fundamental way," Yoo says. "When you have things like contact lenses with electronics, you know that this is on the horizon."

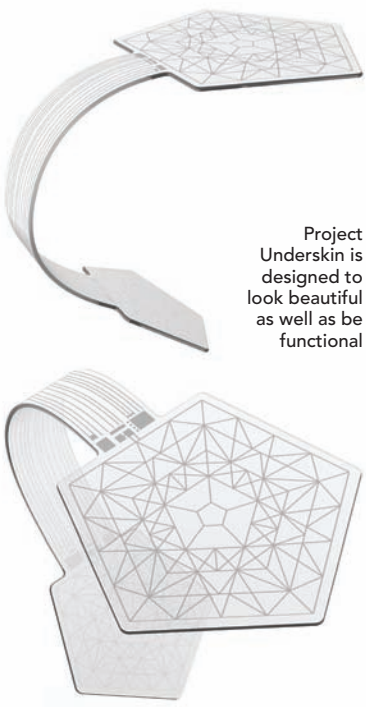
Yoo and his team at New Deal Design are approaching that horizon with their work on an embedded wearable: Project Underskin. Still a concept at this stage – it will stay in this phase until it has a client that wants to move forward with it, says Yoo – the company believes Underskin has many potential uses. To date the team has explored dynamic authentication for bank cards; networking – where two wearables exchange information via a handshake; biometric monitoring; and self-expression, where the wearable acts as "a living tattoo" that "expresses your identity based on your interactions and who you interact with".

It may seem an extreme concept, and Yoo admits that adopters of this most intimate of technology may at first be limited to "the vanguard of the vanguard", but it's not without precedent. In 1958, the first fully implantable pacemaker was fitted and there are now millions of people worldwide that rely on these devices to live a normal life. Similarly, implantable contraceptive devices have been available since the late 1990s.

"The notion of a pacemaker – implanting that bit of technology that controls your heart – must have been an absolutely mind-blowing concept originally," says Yoo. But, as he points out, those devices have spawned more opportunities for technological advancement.

"Now we're at a place where we're thinking about an extension of the body that informs you of how that pacemaker is doing.

"That doesn't seem very implausible at all."



Project Underskin is designed to look beautiful as well as be functional

REALITY CHECK

VIRTUAL REALITY COULD REVOLUTIONISE RESEARCH BY MAKING THE CONTEXT SEEM REAL, NOT JUST IN TERMS OF RECALL BUT ALSO WITH 'WHAT-IF' SCENARIOS. **TIM PHILLIPS** AND **JANE BAINBRIDGE** REPORT

Three years ago Lieberman Research Worldwide CEO David Sackman was placed on a small platform above a concrete floor in a warehouse, and ordered to walk along the narrow beam suspended in mid-air. He couldn't do it – which isn't surprising until you realise that the platform, the beam and the concrete floor were simply virtual reality (VR) projections in the headset he was wearing, and Sackman's rational mind was aware that he was standing safely in an office building.

He immediately saw that there might be applications for market research, he says. "No matter how rational you are, given the right stimulus, your emotions take over. This is a very new technology to the commercial world, and we're not even in the early adopter stage yet. The rational mind cannot overcome the non-conscious stimulus and 75–95% of decisions are non-conscious. But as researchers we're getting the rational side."

VR has the potential to revolutionise research because it makes the context of research seem real – not just to help subjects recall an event, but to create what-if scenarios for future products or environments that would be impossible to present convincingly using existing techniques: for example, mock-ups. The headset can change the reality for the respondent too. For example, being 'aged' in a virtual future causes people to make more deliberative choices about their present-day health and finances.

Sackman admits that the technology has been used only two or three times in market research – at $100–300,000 for an initial pilot project, the entry point price is high – but is under consideration by around 50 other Lieberman clients. In one real-life piece of research, respondents were not asked to rate a soft drink, but to dress as that drink in the VR world by adopting a virtual avatar. Then they were asked to rate themselves. Dressing as one brand (Mountain Dew) caused the subjects to think of themselves as more adventurous, dressing as the other (Coca-Cola) led them to consider their character to be more traditional.

"This is the non-conscious rating of a brand – the behaviour in this experiment could predict purchase next week," says Sackman.

'Living the brand' is an FMCG application, but Dr Walter Greenleaf of Stanford University, who has a history as a VR pioneer going back to the 1980s, has been developing applications for decades. His main interest is in therapeutic uses, for example to treat post-traumatic stress disorder or strokes. He sees industries like research helping to sustain the development of better hardware.

"We can fool the visual and auditory system. Our brains go there, we can't help it," he says. "I think we could do a lot with VR in market research. For example, if I want to design a home for people in wheelchairs, and I could put an architect in a wheelchair and have them roll through the virtual house, I could do a very effective job. The research would be very close to what would happen in real life."

Sackman argues that, used carefully, VR has revolutionary potential to bring real and imagined context to the research process, rather than the other way round. It is also extremely precise, because the researcher has complete control. Greenleaf's experiments in treating trauma show that, at the current resolution, the VR headset is entirely convincing for most subjects. "It's an extremely careful experimental design because the only variable we change is the stimulus in virtual reality," Sackman says.

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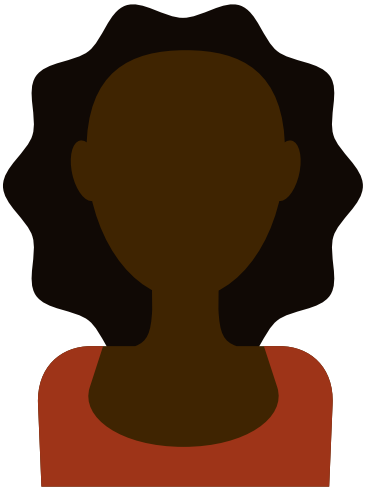
POSITIVE ATTITUDE

SOCIAL PSYCHOLOGIST **SHARON SHAVITT** THINKS RESEARCH INSIGHTS FROM NON-WESTERN CULTURES MUST BE INCORPORATED WHEN LOOKING AT SOCIOCULTURAL ATTITUDES. *ELINA HALONEN* FINDS OUT MORE.

Much of our knowledge of good questionnaire design is based on decades of research in social psychology on attention, memory and information processing. Over time, we have learned how to interpret the results of global studies in a way that takes into account other psychological findings such as acquiescence bias or extreme response bias, but what about the underlying concepts themselves? With 96% of the world's psychology research being conducted on 12% of the world's population – and most of it in the western world – it's possible some of our most fundamental concepts are going uncontested.

Social psychologist and fellow of the Society for Consumer Psychology Sharon Shavitt, from the University of Illinois, Urbana-Champaign, recently suggested a new theory of attitudes that highlights how differently they function in western and non-western cultural contexts. Reading the article, I was struck by the fundamental challenge this new theory is posing to us as a sector, so I wanted to interview her to ask her more questions.



***Impact*:** You recently wrote an article – 'Preferences don't have to be personal: expanding attitude theorising with cross-cultural perspective', in *Psychological Review* – that quite radically challenges most of what market researchers see as conventional wisdom about attitudes and how we should measure them. How would you describe what our attitude has been towards attitudes? What are our biggest misconceptions about attitudes and their measurement?

Shavitt: In our cultural context, our attitude toward attitudes is very positive. We like attitudes. We cherish our attitudes. They define who we are as individuals.

This positive attitude toward attitudes is no less true in the research literature. In 1935, one of the giants in social psychology, Gordon Allport, wrote that "attitude is probably the most distinctive and indispensable concept in contemporary social psychology" and, today, multi-volume handbooks are devoted to this topic. Western theorists have viewed attitudes as stable and consistent properties of individuals. Attitudes also define who we are – that is, they are self or identity expressive.

***Impact*:** In your article you talk about how, in non-western contexts, attitudes can change depending on the situation, whereas western research methods implicitly assume that attitudes and preferences are more or less constant over time. Additionally, people in non-western contexts can often hold attitudes that are more inconsistent, even within one person. What causes these differences, and do they apply to all product categories in a similar way?

Shavitt: Yes, you would expect that attitudes in non-western contexts would be less stable and internally consistent. In western contexts, personal preferences are central to attitudes ("I like it because it makes me feel good"). But, in non-western contexts, there is a stronger emphasis on connections with others and within

groups, which brings with it an emphasis on behaving appropriately and fitting in with others' expectations. You wouldn't want rigid and unchanging attitudes in that cultural environment. Such attitudes would get in the way of fitting in and being socially appropriate. Instead, you would want malleable attitudes that are responsive to others' views ("I like it because others I am connected to like it").

Related to this, it's also worth mentioning that contradictory opinions are perceived as more acceptable in non-western cultural contexts. So, people in non-western contexts may feel more comfortable expressing different attitudes over time and across situations. In the West, doing that can be considered hypocritical or, at best, flaky.

We think these points apply broadly across types of products. Research has shown cultural differences for a wide range of products and topics of attitudes. One could speculate, however, that these differences will be stronger the more socially visible the product or more likely it is to be consumed with others. For such products, norms may play a stronger role in non-western contexts.

***Impact*:** You also mention that the differences in western and non-western ways of thinking result in different patterns of survey responding. While researchers are aware of things such as acquiescence bias, what other things should we take into account when designing surveys that span multiple markets and cultures? Under what circumstances can marketers and researchers trust the findings from non-western contexts? And how can we, as market researchers, make things better?

Shavitt: I think that if we use methods of surveying that are designed around western ways of thinking, we shouldn't be surprised when those methods provide unreliable evidence about non-western consumers.

One recommendation would be to measure and map attitude variability among non-western consumers. Their attitudes towards an object are expected to differ across social contexts. For example, attitudes towards having soup for dinner with a colleague can differ substantially from attitudes towards having soup for dinner with a family member. In our model, such differences are not 'problems' – they are of focal interest. Mapping them can help marketing researchers to identify the use occasions that resonate for the target audience, and learn which contexts to feature in marketing communications. ■

Elina Halonen is communications officer at the Society for Consumer Psychology, and a partner at the Irrational Agency.

A QUESTION OF TASTE

A JOB THAT INVOLVES BEING PAID TO TASTE FOODS MAY SEEM LIKE A DREAM, BUT IT'S A LOT MORE COMPLICATED THAN EATING AND CHATTING, AS **BRONWEN MORGAN** FINDS OUT WHEN SHE OBSERVES THE WORK OF A SENSORY PANEL

I'm standing in a room that looks like a cross between a chemistry lab and a kitchen. It's giving me (not entirely welcome) flashbacks to home economics lessons – but there's not a burnt quiche in sight, because this is the Sensory Science Centre at the University of Reading's Department of Food and Nutritional Science, where one of MMR Research's expert sensory panels is taking place.

The panel – one of four globally, the others are in the US, China and Singapore – is owned and run by MMR, but is based at the university. Most of the panel's projects are run for commercial clients, helping to create food, drink and personal-care products. However, the panel also works on specialised university projects; for example, the exploration of astringency or of different umami compounds.

Each member of the 16-strong panel has gone through an extensive selection process to test their sensory acuity. "The recruitment process is very strict," explains Christine Barnagaud, sensory director at MMR. "Obviously, panel members can't have any allergies, but they also must be able to, and be comfortable with, verbalising their thoughts, perceptions and opinions." Panellists must also be non-smokers, can't wear scented cosmetics or perfumes if they are working, and must not consume any coffee, tea or strong-tasting food for at least one hour before a session, Barnagaud explains.

"It [the selection process] was like exam conditions," says panel member Helen Russell. "There were people in white coats saying: 'Sniff this; smell this; don't smell that; do this'."

Testing potential panellists' sense of taste and, crucially, their ability to describe what they have experienced, takes around half a day. Those who pass muster are then asked back so their interaction with other people can be observed. "There's no point in sniffing and smelling and not talking," says Russell.

The group I meet has 11 members (the panel is split in two and both groups meet for between two and three hours, four days a week), and all-but-one of them are female. This is coincidence, rather than a sign of any heightened sensory acuity among women, Barnagaud insists.

Russell tells me they have tested all manner of products, from whisky ("that was fun") to sea buckthorn ("it smells and it tastes – not that I've ever eaten it before – like pig poo"), but they don't have the luxury of being fussy about projects: "We have to sign a piece of paper that says you will eat anything that's put in front of you. So we do," she says.

Today, the panel is tasting apples, but this is just a demonstration for my benefit. A live project would be too commercially sensitive to share. The session, led by a moderator, starts with a discussion of how they will hold the apple when tasting it.

This may seem overly prescriptive, but the texture and flavour of the apple differs significantly from, for example, the middle of the fruit to the area by the stalk, and uniformity of experience is key. To illustrate the importance of this, Barnagaud refers to a famous taste test: "The classic example is that – in a sip test – Pepsi is usually preferred over Coca Cola, as it is sweeter and people tend to state a preference for sweeter profiles based on a small amount ingested.

"However, the preference is reversed when the consumers are asked to drink a full glass of each, as a sweeter profile can become sickly, and the complexity of the flavour profile of Coca-Cola becomes more attractive."

The panel members spend 10 minutes tasting the apple and making notes, before comparing thoughts. They discuss: the odour – of the whole apple, then after one bite, as well as how this changes over time; the flavour; the mouthfeel (both with and without peel); and the aftertaste. The panellists use words such as "stalky" and "green" to describe the flavour. This seems vague, but the training the panel has received means specific flavours, and the language used to describe them, have been calibrated to ensure consistency.

The moderator then introduces a selection of reference items – including melon, cucumber, grapes, green beans and coriander, plus bottled scents from flavour house Givaudan – so that the flavours and odours of the apple can be compared with these. A panellist had picked up a trace of coriander in the apple; by comparing it with real coriander, this can be narrowed down to being either a "leaf note" or a "stalk note", giving a tangible reference point for a client.

"The overall aim of sensory profiling projects is to ascertain how different products compare in terms of their sensory characteristics – different products for a natural raw fruit means different varieties or cultivars, for example, Royal Gala v Braeburn," says Barnagaud.

MMR sensory panel members have to agree to eat anything that is put in front of them

"However, there is an innate variability between each individual fruit, which means the score for a given attribute will be affected by which fruit you see or taste. This means we have to capture the assessments a repeated number of times to get a true picture of how variable the product is overall, and its average score on a given attribute."

The panel has been trained to dissociate appearance and smell or taste, but in order to account for any potential effect of this, the centre has recently added a room of individual booths, equipped with tablet computers for recording scores. The room's lighting can be adjusted to simulate daylight and supermarket lighting, as well as a red lighting effect, so panellists can't see the detail of what they're testing.

I'm slightly overwhelmed by the level of detail the panel goes into. I tasted the apples at the same time as them and they just tasted… well, apple-y. However, the sensory testing is just one part of the story, explains David Howlett, strategic planning director at MMR. Most projects are also underpinned by large segmentation studies, because preferences can vary widely across populations.

"This is extremely important, as in most cases we will find that several segments of the market want products that are very different, sensorially, and cannot be reconciled," Howlett says. "This means our clients are better off targeting a segment and developing a product that truly delights these people, rather than trying to create a product that won't be particularly appealing to either group, and won't be distinctive sensorially.

"For example, combining groups that want a smooth, blended soup with groups that want a chunky-vegetable soup would lead to creating a half-pulpy soup that is unlikely to work for anybody." ■

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The good citizen

DISILLUSIONED WITH THE ADVERTISING BUSINESS, **JON ALEXANDER** SET UP THE NEW CITIZENSHIP PROJECT TO ENCOURAGE A MOVE AWAY FROM CONSUMPTION AND TOWARD PARTICIPATION. HE TALKS TO *JANE BAINBRIDGE*

Whatever you do, don't mention the word 'consumer' around Jon Alexander. The term is liberally used in any conversation involving marketers and market researchers – often as lazy, catch-all shorthand – but, for Alexander, it is terminology that should be prohibited.

The reason for his absolutism is a moral argument twinned with a creative one. "When you use the word 'consumer', you can't help but think of people as having only one real line of agency – buying from you. Use the word 'citizens', and you immediately think of people as having multiple lines of agency to participate, co-create, challenge, build and more," he explains.

"We think you can have a far more creative, generative society if we, the people, are allowed the space to think of ourselves as citizens – not just told constantly that we're consumers."

So the choice of name for the organisation he founded – the New Citizenship Project – was carefully crafted. Its remit is to help "a more genuinely participatory society emerge; a society in which the primary role of the individual as a citizen, not

just the consumer". For Alexander, setting up the project was the ultimate outcome of a gradual realisation that he wanted to do something different.

He began his career as an account planner at advertising agency Abbott Mead Vickers BBDO, and went on to lead Fallon's social responsibility work, among other advertising and marketing roles. However, this employment path proved not to be what he had hoped for. Like many before him, Alexander found himself deeply disillusioned with the world of advertising; unlike many before him, he decided to do something about it.

So was it daunting to step out of the world of advertising and go it alone with such an ambitious project?

BALANCED PERSPECTIVE

"It was a relatively steady transition – the hard moment was leaving the ad industry, in about 2010. I went to work for the National Trust, so that was relatively safe, in that it was still a job," Alexander explains.

As an in-house brand strategist, he worked on several ideas for the National Trust. Among these was MyFarm, an online experiment in farming and food production, in which 10,000 members of the public could make decisions about running a real, working farm.

Alexander was also involved in a children and nature platform that included supporting Project Wild Thing, to encourage children to reconnect with the natural world, and launching its *50 things to do before you're 11¾* list of outdoor adventures for families.

"After three years working at the Trust, I felt like the work I'd done there had its own momentum, and I wasn't needed," he says.

"I had a more balanced perspective, so I was ready to start digging on the two questions I have been obsessed with for some time: what are we doing when we're telling ourselves we're consumers constantly, and what would it look like to bring all that creativity to participation?"

Pondering these questions, hooking up with like-minded people, and getting a couple of early projects that fitted with his thinking, set Alexander on the path to establishing the project. Then it was very much a case of just getting it off the ground.

"In terms of the journey I've been on, I'm a big believer in just start – take the first step and everything else will follow," he says.

However, for something like the New Citizenship Project to take hold and grow, there needs to be a momentum and some groundswell of support. In a society seemingly obsessed with economic growth – and fearful of anything that doesn't lead to financial profit – is now the right time?

"We're in a really interesting moment in time," says Alexander. "I think the role of an individual in society shifts and changes over time.

"We've made the transition from subject to consumer through the 60s/70s/80s, and now the era of the consumer is, potentially, coming to an end – and the era of the citizen is emerging. There are all sorts of explanatory factors, from political, economic and technological, and the rise of the internet.

"I'm a big believer in [the philosopher] Marshall McLuhan's idea that the medium is the message. What he meant was that, in any society, the dominant medium comes to shape the interactions in it. In a society dominated by television, you become consumers, because your mode of interaction with the TV is to choose what you watch, but not to participate actively. It's a one-to-many medium. In a society dominated by the internet, it's something very different – it's potentially many-to-many, so the impact that the web has on broader societal interaction is really interesting.

"Are people ready? When I look around, there are lots of interesting experiments taking hold all over the place, but the dominant story is still one of the consumer."

MARKET V FORUM

Is it acceptable to use a marketing and advertising skillset – the very thing that drives consumption – toward a participatory goal?

"I don't think an end justifies the means – that logic could be applied if it was to get them to buy something different. In a way, marketing becomes the wrong word for what we're doing because it's not about the market, it's about the forum," says Alexander.

"Just think how much creativity and energy we put in getting people to that place, and then think about how much goes into getting people to participate, and it's fuck all. My thinking is more about creativity and inspiration – why should we treat participation as something inherently dull and boring?"

CITIZEN CAN

21ST-CENTURY PEOPLE POWER

The New Citizenship Project commissioned some YouGov research to test the hypothesis that "priming adults with questions that focused on them either as a 'consumer' or as a 'citizen' would impact on their responses to a series of questions on participation".
It questioned a nationally representative survey of 3,597 British adults online, with the sample split into three groups. One group was given consumer-priming statements before the participation questions; the second had citizen-priming statements; and the control group were given only the participation questions.
The consumer-primed group were asked whether they agreed with statements about brands and gadgets, while the 'citizen' questions focused on equality, the environment, friends and family. After this, all three groups were shown questions on participation.
The outcome was that the 'consumer' group had the lowest net 'importance of participation' scores, while the 'citizen' group had the highest and the control group was in the middle.

So the ultimate question is, how do you make people do it? For Alexander, it's about rethinking their roles and adapting products or services accordingly.

"One of the things I worked on at the [National] Trust that I'm most proud of is around membership – reframing it from a consumer product and starting to explore how membership is about an expression of values, rather than just a purchase of value," he explains.

Alexander is certainly aiming big with the New Citizenship Project. One of his heroes is Lord Young – politician, entrepreneur and social activist, who wrote *The Rise of the Meritocracy* and helped establish institutions such as The Consumers' Association, the Open University and the Open College of the Arts.

"That's what I dream of us becoming – to do for the citizen era what he did for the consumer era. So, in two years' time, I aspire to us catalysing the way of thinking among the broader population and other thought leaders, and having created two or three really iconic initiatives that speak to the promise of this era," says Alexander.

For example, he's working on a cooperative business idea that's a hack on the Airbnb model – trying to express an idea of what travel and tourism for citizens, rather than consumers, would look like, but with the aim of sustaining distinctive local cultures and economies.

"We are also working on a civic participation platform as a way for people to get involved in local communities," he says. "It's about giving families something to do together in the holidays rather than going shopping or to the cinema."

Alexander insists he's not an anti-capitalist, but thinks the way in which society works needs to be redesigned. "I believe in the role of the market in a healthy society, but I believe we must reclaim our moral agency in order to shape that market to work for us," he says.

THE JOB MARKET

THE AGE OF DIVERSITY

Senior researchers may not be using Snapchat and Instagram, but that doesn't mean they don't have valuable market research skills – so clients looking for an age-diverse workforce should make developing opportunities for senior researchers a priority, says Sinead Hasson

In the past, issues of diversity relating to gender, ethnicity, disability and social class have sparked fiery debate in the market research community. While the 'diversity dialogue' has been largely positive in tone, questions at last year's Impact conference cast doubt over whether market research firms had realised any tangible benefits for their efforts. Progress is being made, but the part of diversity I want to discuss here is age. It is often overlooked, and can deliver great returns.

In a recent CIPD survey (August 2014: *Championing better work and working lives*) 56% of UK small and medium-size enterprises (SMEs) highlighted enhanced knowledge-sharing as a key business benefit of an age-diverse workforce. Larger employers (250+ staff) agreed. The study revealed other benefits too, including improved problem-solving (34%) and enhanced customer service (21%). The key to realising these benefits is to build an assessment programme that delivers the clearest possible picture of candidate suitability in the context of the diversity already displayed among the team they are to join.

Set realistic diversity goals

A good first step is for employers to ensure their aims match the capabilities of their recruitment resources. Is your firm exposed to candidates with all levels of experience? Are the objectives of senior management reflected in your job ads, CV filtering process and interviewing techniques? Care is needed here, because there is a fine line to tread. Prioritising a candidate's age (or gender, ethnicity or socio-economic status) over their skills and experience can quickly get you into hot water. These should be contextual observations, not policies for hiring.

> "The idea that older researchers don't have anything to offer in the social/digital age is just nonsense"

As more consumers engage with their favourite brands online, the pressure to bring digitally conscious 'millennials' into research teams continues to grow. However, this influx must be tempered by individuals with more experience in research methods, client handling and the myriad other skills required to operate effectively. They may not be Snapchatters or Instagrammers, but the idea that older researchers don't have anything to offer in the social/digital age is just nonsense.

That's not to say they don't need a helping hand – frankly, who doesn't? The speed at which the market research world is changing means that providing professional development opportunities at all levels has never been more important. The aforementioned CIPD survey supports this point, too, with 53% of respondents agreeing that training is fundamental to ensuring mature employees continue to perform optimally.

Fly the flag

If market research firms are serious about harnessing the benefits of an age-diverse workforce, they must tell the market about their intentions. Without the right kind of engagement – with staff, partners, customers and, crucially, with their recruitment partners – their initiatives will remain nothing more than lofty ambitions.

Beyond project management skills, operational stability and client handling experience, mature researchers can offer an alternative perspective on a brief, a problem, a data set or, indeed, on a business function. Market research firms will do well to keep this in mind as they expand their horizons this year.

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

INSIGHT '15

29-30 April | Olympia Central | London

What our visitors say:

Abigail Clark
@AbiAPA ★ Favorite

Great day yesterday, so much to see & useful speakers and lectures. Get down to Olympia to see for yourself, it's a goodie!

Jade Larkin
@jadelarkinn ★ Favorite

Two days mingling with #mrx professionals & discovering cutting-edge solutions for customer loyalty. Can't wait for #Insight15!

Kurt Kamm
@kurt_kamm ★ Favorite

Very interesting time today in London. Great catching up with suppliers and meeting new ones, loads on offer!

Europe's leading event for market research professionals is back.

Insight'15 (previously called The Insight Show) will return to Olympia from 29-30 April.

Featuring three conference theatres, a host of dedicated market research exhibitors, and a range of networking opportunities, it's an event not to be missed.

Register today at insightshow.co.uk/impact

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CONSUMER LAW IS A VALUABLE COMPLEMENTARY TOOL TO DATA PROTECTION, AND BUSINESSES SHOULD LOOK TO BOTH FOR BEST PRACTICE, SAYS **DR MICHELLE GODDARD**

CONSUMER PROTECTION

In this, my first *Impact* column on legal developments, I thought I would start with a subject close to home, by highlighting the role that consumer protection laws can play, in tandem with the data protection framework, in building consumer trust.

Respect for consumer privacy underpins the credibility of market research that provides evidence-based insights across the public and private sectors. Specific safeguards in the Data Protection Act (DPA), the primary legal tool in this area, can be enhanced by the toolkit available in the wider consumer protection framework – particularly in addressing poor privacy practices and misleading behaviour in the collection and use of personal information.

In the US, consumer protection laws have traditionally played a key role in protecting the rights of data subjects. European authorities are now starting to explore the complementary links between consumer protection and data protection, and the ability of consumer laws – through promoting accurate information, transparency and consumer choice – to enforce better privacy compliance. At a domestic level, we can reasonably expect to see this type of work mirrored, with greater interaction between the work of the Information Commissioner's Office (ICO) and the Competition and Markets Authority (CMA). The CMA is currently taking an interest in this burgeoning market and the consumer implications of the commercial use of consumer data, highlighted by its recent consultation on the issue.

CHANGING FRAMEWORK

The government has radically changed the consumer protection framework through the introduction of the Consumer Rights Bill, which comes into force later this year. The bill sets out core consumer rights as part of a fundamental modernisation and clarification of the framework. It also incorporates changes to the unfair contract terms regime, which may be of particular significance in reviewing the treatment of online privacy policies.

Although the bill is important in the overall simplification and reform of the consumer framework, there are some additional pieces of legislation (of recent and historic vintage) that have greater, and more direct, impact in protecting personal data.

Of primary use is the Consumer Protection from Unfair Trading Regulations 2008 (CPRs). These implement the EU Directive on Unfair Commercial Practices and protect consumers from unfair or misleading trading practices, misleading omissions and aggressive sales practices. The regulations, as supplemented with a private right of action introduced through the Consumer Protection (Amendment) Regulations 2014 in October 2014, ensure that, where a business lies or uses aggressive practices, consumers can sometimes take direct action rather than waiting on a national enforcement authority.

Availability of enforcement action on poor privacy practices through CPRs and other consumer laws may be particularly useful in extending available redress for data breaches, and possibly increases budgetary provision if the area becomes a strategic priority for consumer authorities.

Businesses using the guise of research as a means of generating sales (sugging) or fundraising (frugging), which continue to be problematic in our sector, should fall within misleading practices. Indeed, specific guidance on the treatment of this under the CPRs would more clearly and directly bring these disreputable practices under its ambit.

The CPRs also provide a complement to the 'fair and lawful' principle in the DPA by:

■ Promoting the need for transparency in transactions – the lack of transparency on

collection, use and transfer of data, such as through misleading actions or omissions by a business, could be a breach

- Controlling the irresponsible acquisition of data by businesses – the use or transfer of the data in some circumstances would be contrary to the requirements to use professional diligence
- Underscoring the importance of informed consent – the lack of a genuine opt-out for marketing could constitute an aggressive practice.

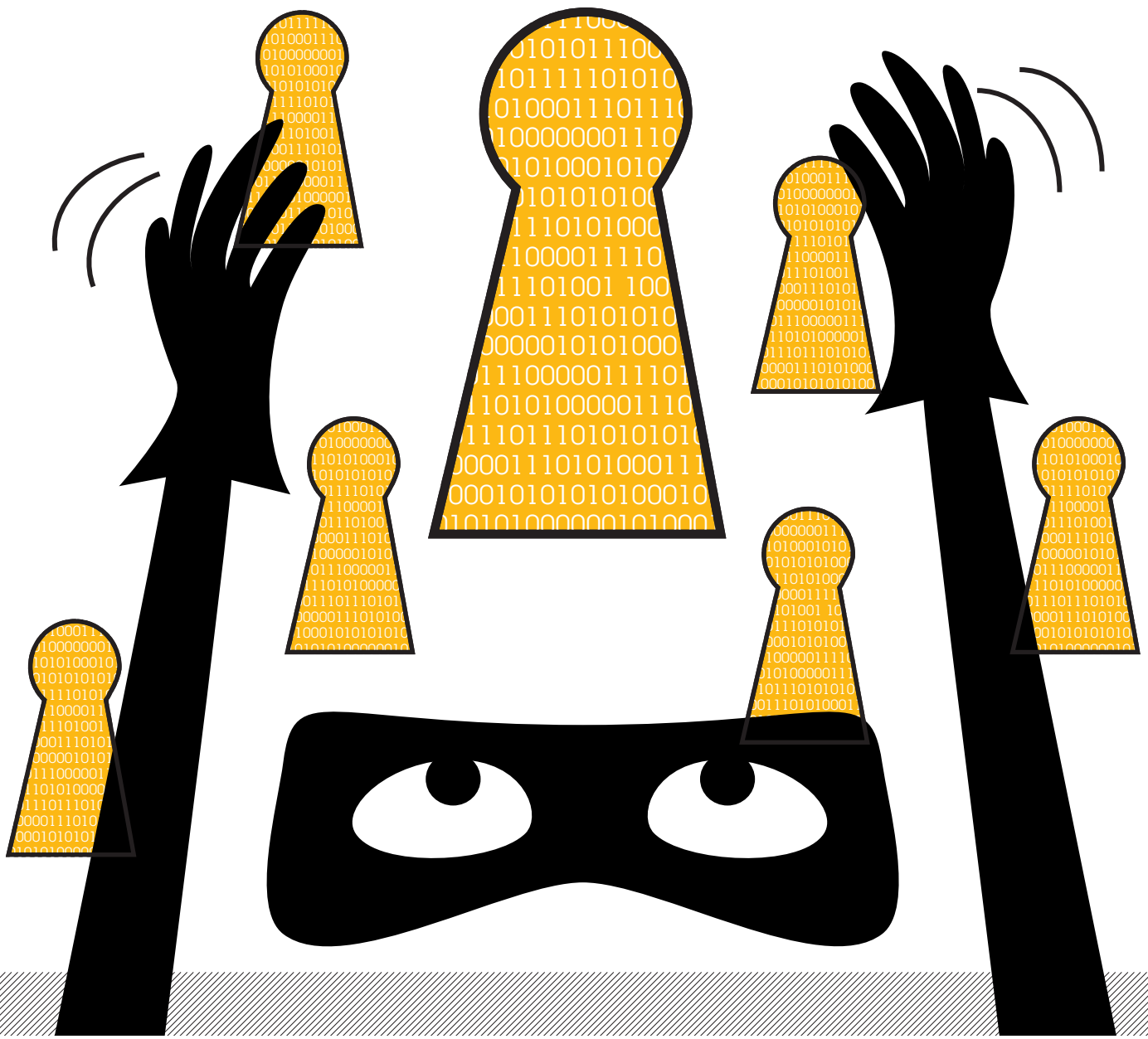
Other laws that require fuller disclosure of details also assist in strengthening consumer rights in data protection. The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 specifically state that the identity of the supplier, and the commercial purpose of the call, shall be made clear at the beginning of a telephone conversation with a consumer. Additionally, the Privacy and Electronic Communications Regulations 2003 make it unlawful to send direct marketing electronically to someone who has not specifically granted permission (via an opt-in agreement) unless there is a previous relationship between the parties.

CONSUMER TRUST IN RESEARCH

A consumer focus is good for business – including the business of research and evidence – and the wider requirements in the consumer protection framework usefully supplement data protection rules and provide an important quality check for maintaining standards of professionalism in the industry.

Strengthening the interplay between data protection and consumer protection laws can build consumer trust and help ensure that those practices, which if left unchallenged can start to undermine the reputation and confidence in the research industry, can be confronted head-on with a multifaceted approach.

Dr Michelle Goddard is director of policy and standards at MRS.



Launching ‘Private lives?’

There was no debate when the MRS Delphi Group decided to cover the topic of privacy; the issue has engulfed not just this industry, but every institution and organisation regardless of sector. As I say in the report, formulating a response to privacy is a matter of urgency that no company, large or small, can resist if it is to continue to operate successfully, or to operate at all.

The report was launched in March, and was picked up by *The Sunday Times* and other broadsheets. But I really hope it resonates not just with the broad audience at which it is aimed, but with you, MRS members.

You will have seen MRS championing trust on so many different levels over the past two years – from nuisance calls and sugging to the loftier societal values that we should all aspire to. Just this month, our consumer trust mark, Fair Data, has picked up an Association Award for Innovation.

MRS Delphi Group was set up to explore the issues that are impacting business and society, and particularly those issues that most affect our clients. Not only is our industry uniquely placed to comment and provide a response and solution to these issues, but, in so doing, we are making ourselves valuable to the brands and institutions that are struggling to formulate a response.

I want to extend the invitation to all members to feed back on this report, on its usefulness, and also to raise any issues that you believe deserve this focus for future reports.

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

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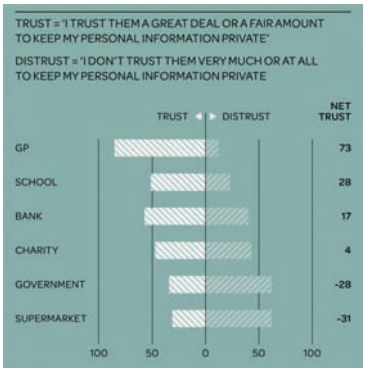

Privacy report: ‘Private lives?’

Last month at annual conference, the MRS Delphi Group launched *Private lives: Putting the consumer at the heart of the privacy debate*. Available free to download, the report:

- Publishes findings from YouGov research commissioned for this report
- Includes commentary from industry experts
- Explores topics such as violations and trust, ethics and transparency
- Draws on recent research to challenge and clarify current thinking
- Includes implications and recommendations for all organisations and brands.

Download the report at mrs.org.uk/privacy

Kids and youth research

MRS has published six short films that give an entertaining and digestible overview of the MRS Guidelines for Researching Children and Young People. Topics covered include: consent and permissions; sensitive information and disclosure; and recruitment, pre-tasks & incentives.
Watch the videos at mrs.org.uk/kids

MRS Roadshows

Join us at an event near you to help shape MRS and ensure the Society meets the demands of the fast-developing markets around us.

Please come and join Jane Frost (CEO), Debrah Harding (MD) and our new director of policy & standards, Dr Michelle Goddard, at the 2015 series of roadshow events.

We will be talking to you about our work on 'Insight Driven Organisations' and 'Privacy and Data Regulation', and we would love to hear your views about a potential MRS Mentoring Programme. It's an opportunity to have your say and to enjoy a glass of wine with colleagues.

Find an event near you: mrs.org.uk/roadshow

MRS Main Board elections

The results of the Main Board elections 2015 for MRS are as follows:

- Joint-chair designate: Crispin Beale and Danny Russell.

As Main Board members:

- Liz Nelson, Stephen Bairfelt and Kirsty Fuller are re-elected for a further term
- Richard Drury and Nick North have succeeded in being elected for the first time.

This year's election attracted seven candidates in total for the year running 1 April 2015 to 31 March 2016. The count was undertaken by Electoral Reform Services (ERS).

New in MyMRS

All MRS members should create their own web account at mrs.org.uk/mymrs to access premium content and services, and manage their account.

- Conference videos: watch keynotes, including Paul Polman and Sebastian Faulks
- Awards 2014 winners submissions and case studies are available
- *Impact* magazine digital archive – all the previous issues now online.

Calendar

Member events

April
23 – Evidence still matters, London
30 – Advanced Analytics, London
30 – AMMO Assembly, Edinburgh

May
13 – MRS Roadshow, Leeds
13 – Awards Showcase, Leeds
14 – MRS Roadshow, Edinburgh
20 – What clients want, London

June
10 – MRS Roadshow, Birmingham
12 – MRS Excellence Awards, London
30 – MRS Roadshow, Bristol

July
1 – IJMR Lecture, London
8 – MRS Roadshow, London

Training highlights

April
24 – Advanced Games for Research Playshop
Delve deeper into the use of games and apply those learnings back in the office, in real-life research studies.

May
15 – Putting Insight at the Heart of Your Business NEW
Enabling insight professionals to analyse their clients' businesses and the external forces and pressures impacting them.

June
5 – Evidence-based Thinking NEW
Ideal for those who have thought about writing a paper for a journal, but feel they don't have the necessary skills to do so.

12 – Focusgroup + NEW
Introducing a new participatory design methodology for the redesign of product or service concepts presented in focus group settings.

17 – Design Thinking NEW
Delve into the everyday world of the user and consumer.

Conferences

25 June – Automotive Research
2 July – BIG/MRS CPS Conference
9 July – Connected World

Find out more at mrs.org.uk/events

Where next?

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

RESEARCH-LIVE.COM

Magazines must adapt to changing reader behaviour
Stephanie Arlett, head of publishing at Carat, looked at the latest ABCs and found that, while some magazines are succeeding in stemming the fall in readers thanks to more multifaceted brands and content across platforms, they still need to do more to develop increasingly bespoke digital experiences that further serve their passionate and engaged audiences.
http://bit.ly/19pq3sM

Bias in the spotlight
A new series of blogs has started exploring the world of behavioural economic biases. Crawford Hollingworth of The Behavioural Architects is taking readers on an editorial journey of biases. His first two blogs have covered System 1 and 2, and heuristics, with many more to come over the year.
http://bit.ly/1BmuhwG

Evaluating viral
UM London's senior insight manager, Michael Brown, has been out on the road with his video camera, capturing the comments of some leading lights in our industry. They have been sharing their thoughts on ad diagnostics and methodologies for video content evaluation, and the first film in the series featured Unruly's insight director, Ian Forrester.
http://bit.ly/17Kn9yn

INSIGHT EVENT

Insight 15
The Insight 15 show will take place at Olympia Central, in London, on 29 and 30 April. Previously part of Marketing Week Live (MWL), it has now been made a separate show. The event will include client-side speakers from global brands, along with agencies presenting case studies.
http://bit.ly/1H67dme

IJMR

Effect of using different labels for scales in a web survey
Melanie Revilla looks at how the choice of labels for closed alternatives in a web survey can affect results. The paper presents a correlation with an external variable that could be used to select the most appropriate scale for a survey.
http://bit.ly/1NlMWuL

But what will people think?
Megan Stodel explores the effect of cognitive loading on social desirability bias. This bias can reduce data quality when it leads to respondents adjusting how they answer questions, but setting respondents a task to do alongside answering surveys could mitigate this.
http://bit.ly/1NlNroz

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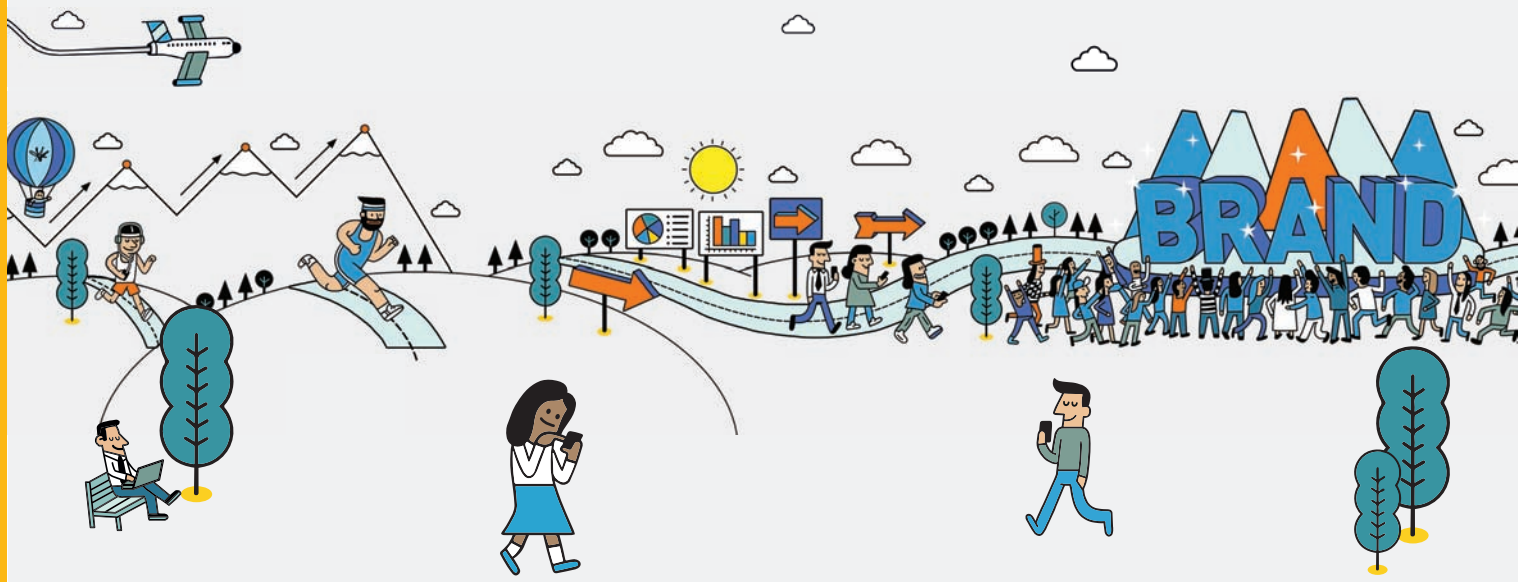

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