Article

Technology Has Empowered the Consumer, but Marketing Communications Need to Catch-Up: An Approach to Fast-Forward the Future

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Abstract: No industry is immune to digital transformation. Social media is empowering individuals everywhere and driving a democratization of personal access that is fundamentally different from the top-down communications associated with traditional mass-media at the outset of globalization. Social media, social sharing, and social business have been accelerated by COVID-19. The rise of e-commerce has materially affected not only how people buy, but also how people research their purchase decisions. Marketing has not kept up with this paradigm shift, and by simply viewing digital as another media channel misses the shift in consumer power and the imperative to engage rather than advertise. Narratives are part of our everyday, and popular stories affect individual and community behaviour. We demonstrate how big data and AI can track the narratives that are shaping our world. Engaging with these narratives can improve marketing decision-making by addressing what people feel is important and result in better outcomes to grow and sustain brand equity in our contemporary, digital world.

Keywords: engagement; communications; marketing; strategic leadership narratives; effective; efficient; accountable; social; transformative; business; technology; big data; AI

1. Context for Change

Many, if not most, industries are undergoing unparalleled change, with not just the speed of change but the nature of change itself changing. Some industries are having more fundamental transformations with the change in landscapes bringing in new competitors. This is especially true where transformation is driven by the significant impact of digital empowerment. The seminal work of Castell’s [1–3] Information Age trilogy (provides a broad foundation, considering the accelerating rate and nature of innovation in our networked and interconnected society, as well as the evolving nature of communications [4], empowering the individual [5]. During COVID-19 the future has in fact been brought forward and we see examples of personal precision and improved prediction driven by increasing use of big data and analytics. That said, for a long-time marketing theory and practice have been disconnected [6], and with an industry in transition it is timely to redress this disconnect. Part of the problem is an incremental evolution of practice, constrained by legacy thinking and structures. A holistic approach is needed to ensure coherence, appropriate prioritization, and focus, at a time when issues of governance and sustainability demand a greater level of granularity. Specific issues to address and solve include:

- Today’s marketing has the same goal but operates in a new world.
- Marketing theory, though static, is useful if understood.
- Digital channels are broken, and their role(s) are misunderstood.
- Social matters that transcend hierarchy with purpose.
- People trust people.
- People are empowered by feeling better informed.
- Marketing logic is a failed narrative; differentiation underperforms.
- People-centricity drives engagement.
- Brand values have passed their sell-by date; ethics trump marketing speak.

The purpose of marketing has not changed: to move markets, to move people, in such a way that products and services are brought into the home (B2C) or enterprise (B2B). However, we have witnessed transformational changes in how a brand’s message can be communicated in a more relevant and credible manner to drive marketing effectiveness. This paper shows a coherent approach to understanding what is significant from a market perspective. It also demonstrates how you can control and nurture your brand and grow your franchise in our contemporary, digital world. Today’s digital realities and market dynamics demand marketers embrace a new level of granularity to ensure communications remain relevant and credible.

The opportunities of the Industrial Age that led to mass marketing and benefited from mass-media have been usurped by social media and social sharing where the message democratizes access [7]. Ideas can come from anywhere, and like-minded communities are not constrained by geography. The complexity and level of interconnectedness in today’s world has been materially witnessed during the COVID-19 pandemic. In fact, in today’s Sustainable Age [8] the only hierarchy is that of imagination. People are now more interconnected than ever before and how they buy and research their purchase priorities have been transformed to make consumers ever more powerful. Being able to understand what people believe is important and has never been more important [9]. Understanding what people think and how they feel enables one to be relevant and engage credibly. With a focus on communications, it has also never been more important to have a common mindset or attitude and a common language so that any organisation can speak with a shared voice.

Part of the disconnect between theory and practice is marketing’s overpromise and under delivery. It is timely to consider a reset. Management guru, Peter Drucker [10] has never been more relevant: “Management is doing things right; leadership is doing the right things.” Here is the challenge: marketing is management not leadership. Too often the challenge of leadership falls to marketers. Like bad politicians, marketers can be fixated on giving their customers what they want even when what they want is not what they need. The most successful companies have moved beyond the limitations of marketing thinking and into the realm of creative thinking, coupled with design thinking. Those who deploy the ‘triple growth play’ of creativity, analytics, and purpose realize dramatically higher average growth rates [11]. With such purpose they can do the right thing in the right way.

That said, many firms are constrained since it is widely thought that marketers are not equipped [12] to deploy marketing analytics, and that only data professionals are adequately trained to handle big data issues of targeting, measuring consumer opinion, and understanding social behaviour [13,14]. This situation will materially impact marketing research going forward, since today’s capabilities can deliver real-time behavioural insights, much cheaper and better, than traditional survey methodologies. Self-evidently, the answer is not to simply leverage web access for cheaper (panel) recruitment. Such analogue thinking simply gets the same wrong answer more quickly, with the limited scope of online focus groups/panels.

However, the basic conceptual framework and techniques for empirical analysis used in marketing that were developed in the 1960s [15–17] and 1970s [18] remain in use today, albeit in refined versions that take advantage of improved data, analytics, and dashboards [19]. There are also numerous broad summaries of trends in marketing issues [20–23], as well as those specifically looking at quantitative marketing [24,25], and marketing strategy [26,27].
The pioneering theoretical and empirical work on buying behaviour by Ehrenberg [28–32] during his tenure at London Business School that culminated in the globally renowned, Ehrenberg–Bass Institute for Marketing Science, remains relevant as it enables a focus on brand growth. The likelihood of selling to an existing customer is between 60% and 70%, compared with between 5% and 20% for a new prospect, depending on the category. Brands grow [33] by focusing on winning new customers, driven by increasing mental and physical availability, resulting in behaviourally loyal buyers. Existing customers already know you, and their memory structures are refreshed when they buy you again. A key finding from this seminal research was the notion of light/low-value buyers and a few heavy/high-value buyers. The graph of value against the number of customers is the negative binomial distribution (NBD). The NBD is a general finding for any brand or category, and the shape remains constant as a brand grows. Thus, growth, is driven across all buyers to some extent. This critical insight is consistent across the IPA database [34]; campaigns targeted at all customers are more effective than campaigns targeted at new or existing customers. Success comes from engaging the market more than the perceived white space, and/or loyalists.

More significantly, the authors believe that although marketing concept and marketing mix remain useful introductory frameworks, there is a need for transformative marketing thinking with a singularity regarding people centricity; People 3.0 [35]. Barwise and Meehan [36] noted that marketing practice had taken theory too far and become disconnected from their customers, by focusing on trivial differences rather than value for money, and quality products and services. They were in “Simply Better” suggesting a back-to-basics approach would lead to greater success. In the same vein, Ambler [37] focuses on the bottom-line. Unfortunately, the academic literature has relatively few marketing cases when compared with other management areas and despite claims to the contrary do not reach marketing practitioners [38].

The rapid access to big data, analytics, and AI [39] reinforces the demand for a people-centric orientation since social media, social sharing [40], and social business are fundamentally re-orientating marketplace control and nature and extent of the influences on the customer journey. Social media fuels the imagination, impacts attitudes and behaviour [9], and facilitates the marketing of products and services [41–43]. Customer purchase intention and buying decision-making has been materially impacted by social media and e-commerce/m-commerce and should be reflected in mobile advertising [44]. For example, Dehghani et al., [45] identified four dimensions that have an influence on YouTube advertising—entertainment, informativeness, customization, and irritation, all of which influenced brand awareness and purchase intention. As the customer journey has changed, the nature of consumer brand connections has also changed materially. The implication for brands is the need to be strategically much clearer.

Digital is therefore playing a significant disruptive role in content analysis [46] and media with new media channels. As with past innovations in media, new channels do not replace old channels, but the relative importance is shifting dramatically. This means that there is unfortunately some legacy structure and legacy thinking and the necessary shake up will perhaps be accelerated by the pandemic as retailing/social distancing in traditional formats are replaced by e-commerce. Programmatic buying and selling leverages a software platform for real-time decisions, rather than weeks or months in advance with traditional media. Conceptually, one can more readily purchase targeted audiences, measure a campaign’s impact, and improve ROMI (return on marketing investment). However, as this new approach has been embraced, and even though it is projected to dominate, there is in fact little governance. As a case in point, the 2020 ISBA Programmatic Supply Chain Transparency Study [47] found that 15% of advertiser spend, or one third of supply chain costs, could not be attributed. Indeed, they found on average that publishers only received 51% of advertiser spend. Programmatic advertising has only recently reached the inflection point to get the attention of the C-suite, and powerful procurement executives. It is the fastest growing advertising channel already accounting for 20% of total advertising
spend today and will grow to 30% by 2023. Yet, it is the least efficient in delivering working media.

The industry had been called to account by P&G’s Chief Brand Officer, industry thought leader, and campaigner for change, Marc Pritchard [48], at the Internet Advertising Bureau’s annual meeting: “We serve ads to consumers through a non-transparent media supply chain with spotty compliance to common standards, unreliable measurement, hidden rebates, and new inventions like bot and methbot fraud . . . ” It should have led to transparency and improved governance since Pritchard was unequivocal in his criticism: “There is no sustainable advantage in a complicated, non-transparent, inefficient and fraudulent supply chain”. At the same time, he also questioned the closed measurement systems of Google and Facebook.

Self-evidently, media buying processes and digital supply chains are not built for purpose in the digital era. That said, opportunities exist to effectively and efficiently ‘engage with engagement’ (Section 3), that demand a new way of thinking and communicating beyond the traditional mindset and practice that is rooted in traditional advertising.

Content creation and amplification is an important issue. So, while social media readily allows for the diffusion of ideas/innovation, we need to be rigorous in how we use it as well as the nature of the narratives we develop to help shape policy. Indeed, there are an increasing number of cases of ‘bad’ narratives that fuel a prejudice [49,50], for example, poverty [51]. Moreover, multiple audiences will likely have multiple interests, distinct prior knowledge, and their own agendas. Understanding what people think is important and what it takes to change behaviour is critical (Section 2). High affect content generates clicks and sharing. This is the thrust of our narrative analyses in Section 3. Naturally, it is also becoming more important to understand our context across broad perspectives to understand the influences more deeply on change and uncertainty.

A special set of editorials recently published in the journal Science argue that social media in its current form may well be fundamentally broken for the purposes of presenting and disseminating facts and reason. The algorithms are running the show now, and the systems’ priorities are unfortunately backwards. They believe “the same profit-driven algorithmic tools that bring science-friendly and curious followers to scientists’ Twitter feeds and YouTube channels will increasingly disconnect scientists from the audiences that they need to connect with most urgently” [52]. The Social Dilemma [53] is a 2020 ‘docudrama’ that explores the potentially dangerous advances in social networking, partially narrated by technology experts. The biggest issue surrounding the regulation of social media is the restriction of free speech and freedom of expression. Attempts to put some controls around this have been received as a penalty rather than a privilege.

Governance has become of broader relevance to marketeers in relation to their brands and corporate stance, as they seek sustainable transitions [54], evolving the nature and scope of corporate social responsibility [55]. This has led to much discussion around brand purpose driving growth, and the role of sustainability [56] has moved to the marketing centre stage as the importance of ESG regarding corporate governance has increased. In late March 2022, the SEC opened its new sustainability reporting rules for public comment. If approved, the rules will require all public companies to report their emissions and sustainable investments. If the new requirements are enacted into law, it could lead to the creation of a new industry to oversee the truthfulness of sustainability reports. When emissions statistics become public, greenwashing will become more difficult. However, some may use their competitors’ sustainability records against them for marketing advantage. That said, in the Sustainable Age [8], ethics will be far more important than brand values. Sustainable businesses will recognize the strategic nature of their sustainability stance.

People in developed economies are pessimistic about the near future [57]. Economic prospects are at an all-time low in nine countries, including the USA, Canada, Germany, Japan, and China. China and the USA experienced the biggest year-over-year drops. In times of crisis and uncertainty people often turn to brands and businesses they trust. The COVID-19 pandemic and war in Ukraine have both magnified and accelerated this trend,
and the expectations for businesses and brands will change as new demands are made by shareholders, businesses, and society. Although greater data and information is readily available, people do not feel better informed; rather, there is an increasing concern about what information is correct. Edelman’s annual monitor refers to an infodemic, during the pandemic, characterised by an “epidemic of misinformation … in an environment of information bankruptcy” [58]. That said, people now expect businesses to play a bigger role to help society, communities, environments in dire need of support, and in rebuilding. Generally, businesses should make a material difference to their communities, and their products and services should have a less detrimental effect on the world. With ever increasing global interconnectedness [7], it is increasingly an imperative that institutions, across both the private and public sector, understand what is important to people [59,60] at any point in time. Human choice is a basic freedom and philosophically can have several dimensions, increasingly including ethical and cultural considerations.

2. Tracking Narratives That Can Change Our World

The ubiquity of the internet has enhanced the importance of social media (first coined in 1994 by the founders of Significance Systems, John Ricketts and Darrell Berry [61]) and social sharing in effecting change. While witnessing the economic successes from readily scalable platform businesses and digital ecosystems across the world, people have benefited from a new standard of utility in service. Recognizing that social sharing is more authentic and trustable than traditional forms of mass communications, it is now possible, with data-based communications insight, to:

- Objectively explore these authentic narratives to understand the drivers and dynamics of changing behaviour and consensus;
- Assess what people value and feel are more important;
- Determine how new solutions can be effectively introduced to create new and better behaviours.

Measuring and interpreting social and linguistic signals by accessing openly available online content is naturally more directly reflective of human behaviour than traditional qualitative or quantitative survey methodologies. Critically, it also provides a coherent diagnostic base to understand, exploit, and change behaviour. From a different perspective, Nobel laureate Shiller [62] has shown how when contagious stories go viral they can drive major economic events. He has coined the phrase “Narrative Economics”. The significant insight is that the public’s subjective perceptions can shape economic trends. Naturally, this provides a more tangible, authentic hook for marketers to enhance a brand’s growth trajectory.

Significance Systems measures long-term engagement for narratives. Naturally, a priori distinctive narratives behave in discrete ways and vary in their value and utility (Figure 1; Table 1). Most internet exchanges are white-noise and thus most narratives, unless harnessed, are transient, having low engagement. If one considers the narratives of the top 100 brands/companies, then their effective communications strategies are focused, and consequently one sees timeless engagement representing at least 90 percent of the narratives.

Table 1. Narrative classification: utility.

<table>
<thead>
<tr>
<th>TRANSFORMATIONAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ A very small number of narratives, campaigns, or, indeed, brands characterised by intense, engaged individual experience with strong timeless themes.</td>
</tr>
<tr>
<td>✓ Fast changing, yet potentially resulting in lasting transformation of the world.</td>
</tr>
<tr>
<td>✓ A volatile environment for the positioning of brands or themes for communications.</td>
</tr>
<tr>
<td>✓ Strong opportunity if there is positive alignment, or great threat if it is an opposed issue.</td>
</tr>
<tr>
<td>✓ Communication power comes from detailed understanding of, and alignment with, both the timeless drivers and the in-the-moment significant experiences of those connected to the narrative.</td>
</tr>
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Table 1. Cont.

<table>
<thead>
<tr>
<th>TIMELESS</th>
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<tbody>
<tr>
<td>✓ A small number of narratives, campaigns, or brands.</td>
</tr>
<tr>
<td>✓ Characterised by long-term, deep engagement, driven by a small number of key players who are often experts and authorities.</td>
</tr>
<tr>
<td>✓ These are authentic. They matter to people.</td>
</tr>
<tr>
<td>✓ They are long-lived. They are good choices for the positioning of brands or themes for communications.</td>
</tr>
<tr>
<td>✓ As issues they are expected to persist or grow.</td>
</tr>
<tr>
<td>✓ They are high value but difficult to own. Focus is key.</td>
</tr>
<tr>
<td>✓ Communication power comes from the understanding of what has long-term significance, and alliance-building with the existing players.</td>
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<table>
<thead>
<tr>
<th>TRIBAL</th>
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<tbody>
<tr>
<td>✓ A small number of narratives, campaigns, or, indeed, brands.</td>
</tr>
<tr>
<td>✓ Characterised by intense debate.</td>
</tr>
<tr>
<td>✓ Personal experience often drives engagement. Commercial perspectives often drive divergent POVs.</td>
</tr>
<tr>
<td>✓ We see that most of this debate, this flow, has no impact: Indeed &lt;1% of content over any given period will have any significance.</td>
</tr>
<tr>
<td>✓ So, although it is easy to be a participant, it is far more difficult to be a player or leader in this space.</td>
</tr>
<tr>
<td>✓ Leverage the power of authentic individual experience via sharing or aggregation/curation.</td>
</tr>
<tr>
<td>✓ Communication power comes from an understanding of what is significant in the moment.</td>
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</table>

<table>
<thead>
<tr>
<th>TRANSIENT</th>
</tr>
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<tbody>
<tr>
<td>✓ Most narratives, campaigns, or brands.</td>
</tr>
<tr>
<td>✓ They are narratives which will fall away without investment of time or resources.</td>
</tr>
<tr>
<td>✓ Strategically, these are often easy to ‘own’: but they must be driven (or connected) to greater relevance and/or differentiation to have long-term value.</td>
</tr>
<tr>
<td>✓ As existing campaigns or issues, they are worthy of tracking.</td>
</tr>
<tr>
<td>✓ Communication power comes from building stronger connections to more engaging narratives.</td>
</tr>
</tbody>
</table>

Figure 1. Narrative classification.

Since it is people who trust people, this type of analysis enables one to ‘engage with engagement’ and thus be part of the ongoing story rather than to try to dominate it from outside, which has been the traditional mass communication norm of intrusion.
The methodology is breaking the mould of traditional consumer research methodologies providing more relevant, timely, and actionable insights.

3. Engaging with Engagement

Being part of the ongoing story naturally helps drive efficiency and effectiveness of communications, as well as critically enhancing brand control. While digital technology has transformed many industries, it has perhaps more significantly empowered individuals, through social sharing. With the rise of e-commerce and a transactional mentality the imperative is to empower the customer to make an informed choice, with communications that stand-out in a relevant way on the customer journey. For marketers, the common imperative is: “I need my marketing to work harder and control my brand messages!”

The proprietary earth.ai (Figure 2) which analyses unstructured data across the internet, has already been successfully deployed to bring powerful insights and enhance decision-making by identifying ‘what is important to people’, in several disparate and strategic areas, including capital markets, market research, business strategy, and politics.

![Figure 2. earth.ai](image)

It can help you understand what is significant from a market’s perspective, not necessarily from a marketing POV. Understanding what the market wants can enable you to magnify and annex ongoing trends. By looking at the web (narratives) differently it can improve any brand’s ROMI (return on marketing investment). In essence, improved decisions empower one to control their (brand) messaging in the digital world; ‘shape the narratives that are shaping the world’.

To illustrate how better decisions are possible it is necessary to accept that social media, beyond being a new media channel, offers a new way of thinking and communicating that enables one to maximise communication power. Several principles, based on signal intelligence and analyses of strategic patterns, have been identified by Significance Systems. Beyond ‘engaging with engagement’ and leveraging existing narratives, these are:

✓ Strategise from structure: Focus on the nature of engagement to exploit the narrative. The mathematical properties of the engagement are reflective of the narrative taxonomy (Figure 1; Table 1).

✓ Conceptualise social: Social media in the wild takes many forms. It is a fast flow media that will only satisfy some needs, in context. It is not a new panacea since,
for many, social media is typically an update of an already formed perspective, itself informed by the perceived authority of other sources. For some, ‘social’ may be the channel through which individual experience is shared, sorted, and assimilated by a community. For others, it is simply light entertainment. For any strategy to engage successfully with fast-flow social media, it is essential to understand the context within which such media are relevant to the narratives at hand, and to those who engage with those narratives.

✓ Embrace gatekeepers: Historically, opinion and thought leaders were easily identifiable and relatively static. It is necessary now in real-time to identify new voices and concepts. Social listening is not the answer since one needs to go beyond ‘buzz’ to identify structurally who holds the network-energised and emergent actors that create communications power.

✓ Be global, live local*: Experience drives engagement. A global strategy demands consideration of the local context and the ability to identify and characterise local engagement. (*Local is not necessarily a geographic construct but more often a sense of psychographic unity.)

✓ Stay human: The machines might be trying to optimise search or programmatic media buying, but tracking authentic engagement is independent of these actions.

✓ Weave a helix: Analyses of engagement of narratives in the wild typically reveals there is already a helix of engagement in play with interlocking threads, reflective of authority and expertise, which, if individually embraced, can strengthen the whole.

The objective empirical basis of the approach, leveraging big data/AI to analyse authentic real-world narratives that affect behaviour, offers a new model of communication power, beyond traditional media broadcast. It resonates with the boundary-less, networked world that empowers people and brings like-minded communities together. To leverage the strong narrative, it is now practical to go beyond traditional media planning considerations, and focus on the existing, strong story and user experience (Table 2).

In other words:

✓ Know what to say;
✓ Who to say it to;
✓ Where to say it;
✓ How to say it.

Table 2. User experience.

<table>
<thead>
<tr>
<th>Analysis</th>
<th>Rationale</th>
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<tbody>
<tr>
<td>1: Engagement classification</td>
<td>To assess where opportunities exist to annex timeless and transformative narratives</td>
</tr>
<tr>
<td>2: Affect orientation</td>
<td>To understand the emotional response of the narrative</td>
</tr>
<tr>
<td>3: Media power</td>
<td>Identify and rank media by their power to influence</td>
</tr>
<tr>
<td>4: Content power</td>
<td>Assess the power of individual pieces of content</td>
</tr>
<tr>
<td>5: Emotional response</td>
<td>Understand how the market feel/emotional tone of the significant content</td>
</tr>
<tr>
<td>6: Relationships</td>
<td>Confirm and leverage the interconnectivity of topics and emergent themes to enhance relevance and credibility</td>
</tr>
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4. Lifestyle Virtual Living Lab (VLL): Some Cases from the UK and Japan

As discussed, narratives and social media are integral parts of today’s connected world. As such, they provide echo chambers/media bubbles that provide a lens to understanding (changing) values and behaviour. For this reason, The University of Tokyo’s Lifestyle by Design Research Unit within the Institute for Future Initiatives instigated an investigation, in June 2019, of some narratives (Table 3) that aligned with the Unit’s mission to explore a holistic lifestyle design that can contribute to improved personal well-being/QOL (quality of life). These narratives were identified by subjective PreSearch of different current publishing channels related to health and wellness. This was felt to be most efficient through establishing a broad but somewhat focused benchmark which would overcome
the transient, white noise, nature of most narratives. It was also decided at the outset to compare Japan with the UK. As noted above (Section 3), it is not unusual that global and local narratives vary in content and structure.

Table 3. Lifestyle narratives in Virtual Living Lab (Japan and UK).

<table>
<thead>
<tr>
<th>Leisure time</th>
<th>Narratives</th>
</tr>
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<tbody>
<tr>
<td>Personal employment</td>
<td>Personal relationships</td>
</tr>
<tr>
<td>Personal life balance</td>
<td>My resilience</td>
</tr>
<tr>
<td>Personal friendship</td>
<td>Personal confidence</td>
</tr>
<tr>
<td>My family</td>
<td>Personal optimism</td>
</tr>
<tr>
<td>Personal nutrition balance</td>
<td>Personal pessimism</td>
</tr>
<tr>
<td>Personal activity</td>
<td>Social stability</td>
</tr>
<tr>
<td>My free time</td>
<td>Economic growth</td>
</tr>
</tbody>
</table>

The original premise was to understand what people wanted, which would enable innovation to magnify and annex ongoing trends. Implicitly it also assumed that social sharing can be more authentic and trustable than traditional forms of mass communications and can drive real world outcomes. By creating a benchmark of attitudes and behaviours to monitor the mood of society, it was intended to help affect policy or monitor any subsequent action plan.

To date there have been eight distinct waves of research, simultaneously in Japan and the UK. This has been referred to as a Virtual Living Lab, which started lifestyle benchmarking before COVID-19, and tracking what people felt was important to them at a unique period [9], with heightened concern for health and well-being. To develop the narrative landscapes, we look at all online sources, in Japan and the UK, respectively, up to the date of the research wave. There is no time window. So, depending on the specific narrative, which self-organises, it could be dominated by recent content . . . or not.

Despite the dramatic social and lifestyle changes as a response to COVID-19, several of the narratives (Table 3) identified by the PreSearch remained timeless (Table 4) in both countries. Although these narratives remained timeless, this does not mean that the nature of or the content that drove engagement remained constant. For the purposes of this paper, the analyses will focus on the Leisure Time narrative.

Leisure Time was a consistently timeless narrative throughout the period June 2019 to December 2021, in both Japan and the UK (Table 4), at a time of unprecedented change in people’s lives. However, while consistently providing an opportunity for long-term engagement, the nature of the content and emotional response was dynamic. Regarding the latter, it is the affect orientation (Table 2) that measures the degree to which the narrative stimulates an emotional response. Naturally, most narratives (Figure 1) are simply neutral and do not provoke any emotional response. The emotional response can be active or passive, positive, or negative.

In June 2019, in Japan the affect orientation of Leisure Time (Figure 3) had a somewhat passive, positive engagement. Such narratives are often long-lived but are vulnerable to apathy and unanticipated disruption; unsurprisingly, people want more. They may not have the strength to survive rapid transformative change. At the same time, in the UK the Leisure Time narrative (Figure 3) had momentum, being active and positive. Such narratives will thrive and prosper. Powered by enthusiasm and energy, they exhibit growth and adaptation, and can drive behaviour.
Table 4. Timeless narratives during eight waves, June 2019–December 2021.

<table>
<thead>
<tr>
<th>Wave</th>
<th>Japan</th>
<th>UK</th>
</tr>
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A measure of the extent to which the existing narrative content is significant is represented by content power (Table 2). It is a measure of individual pieces of content to capture and drive engagement with the narratives core themes. High content efficiency indicates that much of the existing content within a narrative is significant. In contrast, a low score means that there is a gap between the needs of the narrative and the existing content. Leisure Time in the UK, in June 2019, had poor definition and was not particularly well understood. In fact, it was being interpreted rather literally and equating leisure with activity, and the most powerful content was equated with fitness, gyms, etc., for example, ‘Freedom Leisure’ and ‘Everyone Active’ initiatives. Thus, there were opportunities to dimensionalise the narrative and stimulate long-term engagement.
Since our methodology focuses on what people think is important and act on, understanding the influence of emotion and how the market feels greatly enhances the ability to predict future behaviour. Plutchik, an American psychologist, suggested a hierarchy with the eight primary emotions being the consequence of all the other emotions \[63\]. These foundational emotions are joy and sadness; fear and anger; surprise and anticipation; and trust and disgust.

Plutchik proposed a ‘wheel of emotions’ to graphically present this hierarchy, as in Figure 4. In this figure, positive emotions are highlighted in green, whereas negative emotions are red. If there is a clear tonality to the emotions expressed, such as expectation or apprehension, these are shown in purple. The intensity of the colour indicates the intensity of each emotion. The width of each arc reflects the degree to which the named emotion contributes to the overall emotional response. Broad emotions, such as fear and love, are closer to the centre of the chart. The more subtle emotions, which contribute to those broad emotions, are shown in the concentric rings further out. Moving out from the centre, each ring shows a further level of detail. Identifying these primary emotions is critical especially at times of deep feeling when people often react on impulse rather than by rational objective.

Table 2 ranks media voices according to their power to lead debate and shape perception, and drive market performance in terms of preference and desirability. It is not a volumetric measure. Typically, the most popular media are not the ones with the strongest impact on topical or social engagement. The most powerful media were identified as LinkedIn and YouTube. The most powerful story on the latter being a WH Davies poem animation; “No time to stand and stare.” The key topics driving engagement with the Leisure Time narrative (Figure 5) were consistent with its active orientation at the time.

In Japan, in June 2019, the basic emotions of the Leisure Time narrative (Figure 6) were like that in the UK, but the key topics within the narrative driving engagement were much broader in their scope (Figure 7), and less activity orientated and concerned with personal development, with stronger expectations for future changes.

By April 2020, dramatic changes in daily lifestyles had transformed the ‘norm’ around the world, due to COVID-19. The UK was in a national lockdown, while Japan had responded with a state of national emergency. There were much more negative emotions...
associated with Leisure Time in both countries (Figures 8 and 9), but early in the pandemic there were still strong feelings of astonishment and surprise.

By December 2020 the affect orientation in Japan of Leisure Time had become active, while remaining positive. Leisure Time was seen optimistically as providing enhancement to constrained and monotonous living, both in terms of personal development (mind), as well as relationships (Figure 10). Devoting some ‘free’ time for the elderly provided a sense of growth and satisfaction. Expectations of being in control were unrealistic and knowing Leisure Time could be purposeful, for the longer term, was unrealistic and viewed negatively.

In contrast to Japan, the affect orientation of Leisure Time although remaining positive had become passive in the UK, by December 2020. So, while such a remaining long-lived (timeless) narrative is vulnerable to apathy, reflecting the prevailing strong constraints to ‘normal’ living and unanticipated disruption. Personal resilience was a source of pride.
(Figure 11) as families and communities came together. Work and leisure were less well defined, and finding a balance was more a question of finding near-term self-harmony. To this end, Facebook was amongst the most influential media providing support to family and friends.

Fast-forward a year to December 2021, and another year of constrained living had drained the strength of emotions around Leisure Time in the UK (Figure 12). However, it was now more multifaceted and purposeful, with study (and self-improvement) seen optimistically as potentially making a difference. Those with adolescents felt the continued constraints the most, and negative emotions were heightened and depression a real concern. In contrast, new lives/births and extended family interactions brought positive emotions and some respite.

In Japan, by December 2021 (Figure 13), emotional triggers were somewhat different with negative emotions being more associated with work, but the public sector was seen in a positive and motivating light. The positive topics driving engagement within the Leisure Time narrative included thinking about relationships, a happy life, and the sense of working to live with better harmony. If the pandemic had raised health to the top of people’s agenda it was also, in Japan, pushing personal well-being. The Japanese concept of Ikigai [64], ‘reason for being’, has perhaps never been more globally relevant.

During COVID-19, the government responses in the UK and Japan have been very different. The UK implemented lockdowns and numerous rule changes to daily living that were executed differently in England, Scotland, and Wales. The leadership in Japan has been cautious and slow in responding but clear communications, no lockdown, and strong social conformity has seen the country cope materially better than the UK. In contrast, in the UK, confusion and fear were heightened by misinformation and leadership narratives that had no coherence or consistency, and thus lacked leadership.
Figure 6. Leisure Time: Emotional response Japan (June 2019).

Figure 7. Leisure Time: Key topical drivers Japan (June 2019).
Figure 8. Leisure Time: Emotional response, Japan (April 2020).
Figure 9. Leisure Time: Emotional response, UK (April 2020).
Figure 10. Leisure Time: Emotional response Japan (December 2020).
Figure 11. Leisure Time: Emotional response UK (December 2020).
Figure 12. Leisure Time: Emotional response UK (December 2021).
Our methodology, outlined and illustrated here with the Virtual Living Lab, can be practically used in real-time, in line with the appropriate decision-making cycle. In the context of the pandemic, with daily government briefings, it would have been apposite to track how people were feeling and what they were thinking on a regular and coherent basis. Thus, being readily able to monitor how their public messages were being received. With no such monitoring there was no clear strategic leadership narrative, and a unique period of volatility and uncertainty was made materially worse. Had public leaders regularly tracked the emotional response around COVID-19 (Figure 14), then they would have been
more in touch with the mood of the country, understanding what was important, and so better able to respond and project a clear leadership stance.

Figure 14. Daily emotional response to COVID-19 (1 March 2020 to 2 April 2022).

Another example in the context of corporate reputation can be illustrated by the different responses of global brand owners, in early March, to the unprovoked Russian invasion of Ukraine on 24 February 2022. Some international brand owners and companies quickly stopped their business in Russia. Others did not. One such case was Uniqlo. Yanai-san, the founder and President of Fast Retailing, the parent company of Uniqlo, initially felt it was appropriate to continue to operate in Russia and help clothe the Russian people: “The people of Russia have the same right to live as we do” (7 March 2022). However, his strong personal leadership was evident when he reversed his decision (10 March 2022); this reflected a backlash (cf. #BoycottUniqlo).

This speedy decision-making obviated a long-term negative impact on his company’s reputation. The Uniqlo Russia narrative was timeless but negative, and critically an active issue. The emotional response to his initial decision to stay operating in Russia (Figure 15) was recorded within 24 h. At the time the company, while having had a strong positive emotional connexion, saw that negativity around the brand and Ukraine were beginning to drive a different type of engagement. It was a strong leadership decision to recognise that the Uniqlo brand was being associated with these negative emotions, especially regarding the implications for life, and that there was a critical need to reengage. International press such as msn.com, NY Post, and the BBC, along with Twitter were the most powerful media leading the debate and shaping perception (Figure 16), that Yanai-san quickly responded to.
Those MNC’s who carried on operating their businesses in Russia were directly taken to task by the Ukrainian Ministry of Foreign Affairs (Figure 17). The impact on their corporate reputations remains to be assessed but one may hypothesize that a standing and respect that has taken many years to build can be readily destroyed.
Figure 16. Uniqlo Russia narrative analysis (8 March 2022): Content exploration.

Figure 17. Top 50 brands still operating in Russia on 21 March 2022.
5. Implications for the Future

The invention of the printing press had a transformational impact on societies around the world, as ideas and experiences could be broadly shared for the first time. Communications in the twentieth century relied on mass media to inform and entertain primarily in western societies. Mass media empowered mass marketing as with increasing prosperity people had an ever-increasing number of consumer choices. Mass marketing the same message for the same product or service to the same people. With globalization, mass communications came of age as brands went across borders, and brand owners were able to broaden their franchises and get more customers.

The ever-increasing importance of technology is self-evident around us every day, but what is quite significant is that, since the 1990s, the top 50 companies have become increasingly more dominant. The network effect and development of new business models, such as platforms and interaction fields, are the new way to create shared value for businesses, consumers, and society [65]. In 1990, the top 50 companies represented less than 5% of global GDP but by 2020 they represented some 27%. Back in the 1990s, business strategy was dominated by seminal thinking including Porter’s five forces [66,67], which assumed that competition largely came from within a category; however, such static industries are largely no longer present. One only needs to consider who will be ‘Amazonised’ next, by focusing on customer-centricity and thus materially changing the customer experience [68].

Today, the diffusion of new ideas and conversations amongst like-minded communities is greatly enhanced by the almost ubiquitous participation in social media in the mature markets around the world. This has created the most efficient and effective distribution system the world has known. Ideas can come from anywhere in this increasingly interconnected world. This is a dramatic transformation in the manner and speed at which people communicate and engage with each other. As noted above, people are empowered by technology. It needs a response from marketing that is itself transformational and in sync with new communication drivers and behaviours, rather than more adaptations of traditional methodologies that have characterized an industry which has paid little attention to where and how marketing communications add value, through the historical commission system mentality.

To this end, the state-of-the-art communication science illustrated in this paper can ensure the effective, efficient, and, critically, empathetic delivery of the appropriate narratives, in context, to different constituencies. People find trusted voices in their networks; this type of analysis enables one to ‘engage with engagement’ and be part of the ongoing story rather than to try to dominate it from outside, which has been the traditional mass communication norm of intrusion. Our world is being transformed at an accelerating rate, the technological revolution we are witnessing is affecting every aspect of daily lives, and life science innovation coupled with technology developments will see a rise in human augmentation towards the middle of the century [69–71]. Marketing has embraced technology but should also redress the balance of the lifestyle implications from a human perspective. A case in point is the differing rates at which different narrative formats, such as video and visual, are embraced to different degrees by different cohorts. Such segmented behavioural traits have given rise in the West and in China to different social platforms, for example, the case of GenZ [72] and the way they have embraced short-form user videos with TikTok (Douyin in China). Such new ways of thinking and communicating will no doubt follow to marketers’ advantage if they seek the potential of man–machine collaboration [73] to realise ‘augmented humanity’.

We are living in unprecedented and dynamic times questioning some fundamental norms; therefore, it is important to be able to understand and monitor what is important to people, now. Measuring and interpreting social and linguistic signals, by accessing openly available online content, is naturally more directly reflective of human behaviour than traditional market research which typically relies on survey data. The outlined methodology is coherent and objective, readily scalable, and deliberately focuses on what is important to affect behavioural change, rather than attitudes. It analyses millions of
behavioural interactions with content to model human interaction and to provide an objective read on engagement, media power, and the authentic, emotional drivers of (new) behaviour. It can help us to understand what is significant from a market’s perspective and can be undertaken on a regular basis (almost real-time), as frequently as necessary (as illustrated above), to assess the mood of the market or society and to empower a focused, relevant, and credible response. We believe that leveraging big data, AI, etc., in such focused analyses can lead to closer sharing between academic thinking and in-market practice and decision-making. In this way, we would expect marketing communications’ decision-making and impact to improve.

It is self-evidently more effective and efficient to ‘engage with engagement’ that is already present, rather than intrude with a marketing message. In general, to effect change any initiatives must engage in a relevant and credible manner, with narratives that are timeless and transformative. At the outset we should stress that these analyses are not just identifying some interesting things, but significantly those that are important to people now! Thus, from a corporate or policy perspective, aligning with stories that the people feel are driving their current feelings is important to take a relevant thoughtful leadership stance; something that has never been more important as companies strategically respond to ESG reporting.

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