

QUIRK'S

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What's the real story?

qualitative research

One of the most important tasks that marketers face is to understand how their customers or potential customers think. By gaining insight into their customers' deeper thought processes, marketers can optimize communications, making them more impactful and relevant. The difficulty of gaining this insight, however, becomes apparent when you consider that, as human beings, we don't always have access to our own cognitive processes. We may recognize our likes and dislikes; however, we may only grasp the reasons behind these on a superficial level. The deeper motives that drive our thoughts and feelings can be, and often are, hidden from our own awareness.

For example, imagine that a researcher, hired by an automobile marketer, asked you which of two brands of automobile you prefer, Ford or Chevy. Let's assume, for the sake of argument, that you respond, "I prefer Ford." The researcher may follow up and ask "Why?"

At this point, you are being put on the spot. You are in a position where you must come up with a rational explanation for your previous response. To make matters worse, you are expected to provide this explanation quickly.

The interviewer is probably not going to wait 15 minutes as you mull over why you prefer Ford. So, you come up with the first one or two things that enter your consciousness. "Well, I think they build better-looking cars. And they last longer."

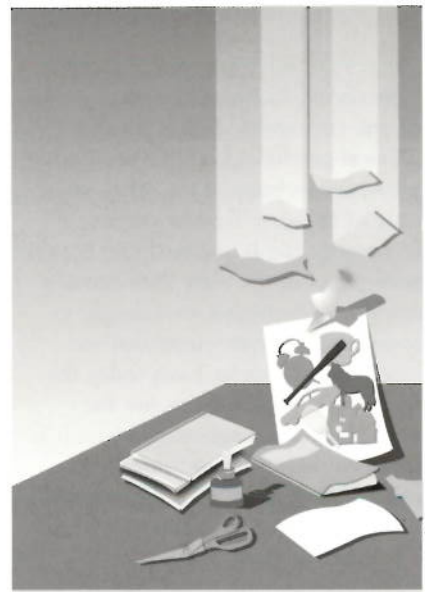
Sounds good, right? Well, the problem is, your response is essentially your attempt to justify your reason for stating that you prefer Ford. In reality, your preference for Ford may stem from reasons that you are not (at least immediately) aware of. Perhaps as a child you had a memorable road trip in a Ford. Perhaps an advertising

campaign for Ford has boosted Ford's image in your mind. Perhaps your neighbor with the bigger house and the swimming pool drives a Ford. There are several possible factors - many of which you may be completely unaware of - that can contribute to your having said, "I prefer Ford."

The real reasons

So how can a marketer identify these factors - the "real" reasons why you express a preference? One of the most effective ways to do this is to conduct projective techniques.

Projective marketing research techniques can uncover the hidden truth



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Projective techniques involve the use of one concept to discuss another. Clinical psychologists have been using projective techniques for many years. One of the most famous projective techniques, the Rorschach test, became widespread in the early 20th century among psychologists who sought to assess their patients' emotional and intellectual function. Even today, the majority of psychologists use the Rorschach test diagnostically, and it is routinely submitted as evidence in child custody cases, criminal sentencing and emotional damage lawsuits.

During the Rorschach test, individuals look at 10 abstract inkblots, and provide their interpretations of what is being depicted. The theory behind the test is that the viewer projects his or her feelings and wishes onto the inkblot stimulus, and thereby reveals his or her personality to the therapist.

Individuals can have widely disparate interpretations of the same inkblot. One person may see depictions of gruesome acts of violence, while another may perceive peaceful, harmonious imagery within the same visual stimulus. Consistent patterns of inkblot interpretation can tell psychologists a lot about the viewer's psychological makeup.

Other projective techniques are commonly used to help marketers better understand their customers. Moreover, as qualitative marketing research matures, these techniques are becoming more sophisticated. By drawing from the right side of the brain (the creative, emotional side), projective techniques can help respondents better access and articulate how they feel about a brand, product or service. The researcher, in turn, can understand an individual's responses and reactions on a deeper level than might otherwise be possible.

When conducted properly, projective techniques allow the researcher to circumvent the internal censoring that normally blocks individuals' unconscious feelings, needs and motivations. The real reasons why people react as they do - the emotional end-benefits - can be identified.

For example, when asked directly how they feel about a brand, even the most well-meaning may give answers that do not express their real opinions.

A variety of factors may lead respondents to do this, such as:

- a wish to provide the answers that they think the interviewer wants them to provide;
- a desire to save face by expressing opinions that are consistent with those of the other interviewees;
- an inability to access their own true feelings and thoughts.

Thoughtfully-executed projective techniques can help researchers obtain data that are more genuine and thus more predictive of respondents' actual behavior in the marketplace. Projective techniques can also engage respondents more fully than traditional lines of questioning. And, as an added benefit, those in the back room often find projective techniques to be more stimulating than the usual rote interview techniques.

The following are some (but by no means all) of the projective techniques that qualitative researchers employ when they conduct exploratory research: analogies; personification; collaging; drawing exercises; visualization.

Analogies

The use of analogies - that is, drawing a comparison between two items in terms of their similarities - can be enlightening when researching brand perceptions. For example, a researcher investigating consumers' perceptions of Ford automobiles may ask:

"I'm going to read you a list of stores, and then I'd like you to tell me which of these is most similar to Ford cars. If possible, try to give the first answer that comes to mind. The stores are: Neiman Marcus, Wal-Mart, Macy's, JC Penney, Kmart, Nordstrom, Target, and Lord & Taylor."

As a follow-up, the researcher would then ask,

"What is it about [Store X] that is most similar to Ford cars? How are the qualities of Ford cars similar to this store?"

This line of questioning induces the respondent to talk (indirectly) about his or her perceptions of Ford cars.

The use of analogies in this instance is not to determine which store(s) people associate with Ford cars but rather to get people to talk about their perceptions of Ford cars in ways they might otherwise be unable to do. Because perceptions of stores vary, some

respondents may choose Store A, and some may choose Store B. The researcher should be less concerned with identifying the store(s) respondents tend to select and more concerned with determining the reasons respondents give for the choices they make. Person A may select a different store from Person B, but that is of little significance if these two individuals share similar perceptions of the stores they chose, and hence of the Ford brand.

Personification

A technique similar to analogies, personification involves drawing a comparison between a product and a person. To continue with the example from above, the researcher might say, "Think about the Ford brand, and imagine it were a person. Who would this brand be? How would you describe this person? What personality characteristics would this person have? In what ways do you associate this person with the brand?"

During this type of exercise, the researcher should encourage the participant to discuss such things as the person's values, beliefs, goals, lifestyle, appearance, age, occupation, socioeconomic status, hobbies, interests, etc. All of these can speak volumes about the respondent's attitudes towards the brand, and can go significantly beyond the output of standard lines of questioning.

Another, more advanced technique is to have respondents describe hypothetical social interactions between different brands, as in the following example:

"I'd like you to imagine Ford and other brands of automobiles as people who are at a party. How are they interacting? Who is talking with whom? What are they talking about? Who is at the center of attention at the party? Who is being a wallflower? How is each brand dressed?"

This approach can be especially useful for gaining an understanding of how people view the various competitors in the marketplace in relation to each other. Again, the more detail that respondents can provide about the scenario they are envisioning, the more illuminating this exercise will be. For example, let's imagine that the researcher asks what each guest at this party is drinking, and the respondent says Ford is drinking a particular brand of beer. Probing as to what makes this Ford's

drink of choice can provide useful insights into how the respondent views Ford cars.

A similar exercise involves having respondents imagine all of the brands in the category as being part of a family – literally:

“I’d like you to envision the different brands of automobiles as family members at a picnic. Tell me when you have a vivid image in your mind. Okay, good. Now, who are the parents? How do they get along with each other? Who are the children? Are they rebellious or well behaved? Are there grandparents at this picnic? Aunts and uncles? Distant relatives? If so, which brands are they?”

The most useful feedback from this type of exercise is often in the explanations that respondents give for their answers. For example, while it may not be especially illuminating to learn that a respondent identifies Ford and Chevrolet as the “parents,” the reasons that a respondent cites for identifying these brands as the parents can be highly informative.

Collaging

Collaging is a well-known projective technique and one that can provide genuine insights when used appropriately. Typically, the researcher/moderator will bring a collection of newspapers or magazines on issues not related to the topic to the research session. (Experienced moderators have found that it is often best to bring in an array of periodicals – e.g., newsweeklies, home and garden magazine, and automotive publications – so that participants are more likely to be familiar with at least one of them). The researcher will ask respondents to create a collage that captures their feelings about and perceptions of a product, brand, relationship, etc.

Continuing the example above, the researcher might ask respondents to create a collage that expresses how they view Ford cars. The researcher may then probe along the following lines:

“That’s an interesting collage, Steve. Talk to me please about the various elements in the collage you created. What led you to include each of these elements in the collage? How do they relate to Ford automobiles?”

In a related, somewhat less involved approach, the moderator provides a deck of visual images and has each respondent select one or more pictures

from the deck that best capture their views of the brand. If this technique is chosen, it is important to keep in mind that what is in the deck makes a difference. The pictures can be mixed or matched, related by category or heterogeneous, but should all be of consistent quality. Otherwise, respondents will tend to gravitate towards the better-quality images, thereby diluting the usefulness of this exercise. The follow-up questioning is similar to the follow-up described for collaging exercises: namely, asking respondents to discuss why they selected particular images, and how these images relate to the brand.

Drawing exercises

Often, it can be instructive to learn about what type of person respondents envision as the typical user of the brand, product, service, etc. One of the ways to understand this is to ask respondents to describe this person. However, a more productive route can be to ask respondents to develop a detailed picture of this individual – first mentally and then on paper. The following instructions illustrate this technique:

“I’d like you to think about who comes to mind when you think about the typical person who buys Ford automobiles. As you think about this person, please try to develop as detailed an image as possible in your mind.

“Now, please draw this person. It doesn’t matter whether you have artistic abilities or not: just do your best to illustrate the person you have in mind. Again, please try to be as detailed as possible; try to include such things as the person’s clothing, hairstyle, jewelry (if they are wearing any), etc. Also, try to illustrate the context or setting where this person may typically be found. Also, feel free to include a cartoon balloon showing what this person is likely to be saying. And finally, please give the person a name.”

To follow up, the researcher should ask the respondent to describe their drawing in as much detail as possible. It is important that the moderator keep the discussion on track by exploring how each element of the drawing resonates with the respondent’s thoughts about the brand. For example, if the respondent draws a man with a diamond ring on his pinkie, the interviewer should probe on the

significance of the ring and how it relates to the brand.

Visualization

This is a more involved projective technique that can consume a lot of time and may not be appropriate for all respondent types. However, it can also provide rich insights into thoughts and feelings that may otherwise be inaccessible. Typically, the researcher will ask respondents to close their eyes and relax as much as possible (taking several deep breaths if necessary), and to imagine themselves in a world that is soothing and peaceful. The participants are told to imagine themselves roaming around this world until they feel totally immersed in this fantasyland. Then, each participant is asked to imagine encountering a door that is marked with the name of the brand or product in question. The participant is told to go through this door and to pay attention to what s/he sees, hears, smells, etc., in the realm behind this door – in as much detail as possible.

Alternatively, the researcher may ask the respondent to imagine the brand as a person who approaches the respondent in this realm. The researcher will ask for as much information as possible about this “brand-person” (i.e., what does the person look like, say, do, etc.?).

Whichever visualization approach is chosen, in a focus group setting it is generally best to have respondents write down a detailed summary of their mental imagery and then share what they’ve written with other members of the group. Next, the moderator will encourage the group to discuss the imagery and what it means.

Start simple

Each of the techniques described above can help researchers develop a deeper understanding of their customers. If multiple techniques are to be employed within a single research session, it may behoove the researcher to initiate the session with a relatively simple projective technique and to bring out the more complex methods later on. Regardless of the projective technique that is chosen, the researcher must create an environment conducive to creative thought. That is, participants need to feel relaxed and comfortable, and the setting itself must

be open and non-judgmental. Respondents should understand that there are no right or wrong answers and that the point of the exercise is to freely share with the researcher (and the group, if it's a focus group) the thoughts and images that come to mind. By saying something like "This is meant to be FUN. It's NOT a test. So relax and let whatever ideas you have - no matter how unusual or crazy they may seem - just flow!" the researcher will help to create the sort of environment in which participants can feel comfortable not only with letting their imaginations take hold, but also with allowing others to share in the experience. A good researcher will make these brain exercises enjoyable for all respondents involved.

If the moderator is conducting a focus group (as opposed to one-on-one interviews), projective techniques will be more effective if he or she can first create a sense of kinship among the participants. That is, if the researcher can transform the individuals in attendance from an "aggregate" to a "group," these participants will be more willing to share their thoughts and feelings with the others in attendance.

It is worth noting that, from time to time, the researcher will encounter a respondent who has difficulty with these kinds of tasks, regardless of how comfortable they are made to feel. The researcher should not attempt to pressure such a respondent into providing useful feedback, as this will simply backfire. Instead, it is advisable to back off from asking the respondent to come up with answers to projective-type questions. If it is a one-on-one interview, more traditional lines of inquiry should be pursued. If it is a focus group, the researcher should let the other participants continue with the exercise. Later in the interview or focus group session, the researcher can make another attempt to engage the respondent, as it is possible (though by no means inevitable) that the respondent will be able to more

productively engage in these exercises after more time has elapsed.

Another type of respondent that one will occasionally come across when conducting projective techniques is the smart aleck. Such a respondent is generally someone who views projective techniques (and perhaps even market research in general) as silly or worthless and who decides to express his/her disdain by giving answers in a hostile, careless or similarly unproductive fashion. Faced with this situation, the moderator should move on to the next respondent and refocus the group on the task at hand. It may be necessary to remove the antagonistic participant from the research session.

Time may be needed

Once fieldwork is completed, it is important for the researcher to let the data gel. Resist the temptation to immediately make sense of the data that have been collected. Instead, recognize that it may take time for the implications of the findings to become apparent. The initial encounter with the data from projective techniques can be like viewing a painting for the first time: meaning is often not apparent at first blush. Paradoxically, the better job the researcher does, the more "masked" the responses will be. Respondents will be tapping into deeper emotional/motivational reservoirs, and these may manifest themselves in ways that defy traditional analysis.

Once sufficient time has elapsed, the researcher should look for and report commonalities in the responses. Identify recurrent themes or motifs. When analyzing the data, consider your own free-associative responses to it. Soliciting reactions from colleagues to the data can often help to illuminate the meaning of the findings. Ultimately, the researcher needs to exercise caution when offering his or her interpretations of the data to the client, as these interpretations are inherently subjective.

To help the report reader gain better insight into what respondents articulated and created, it is usually best to include extensive examples of direct-from-respondent output, in either the body or appendix of the report. Including verbatims, scans of drawings and collages, and other output from the research sessions will add depth to the report and allow the reader to come to his or her own conclusions about respondents' attitudes and perceptions.

Profound understanding

Projective techniques are not a one-size-fits-all research solution. These techniques often take time to implement and are generally best suited to exploratory research that has a heavily perceptual component. Due to time limitations and the benefits that can accrue from group discussion, projective techniques are often (but not always) more useful in the context of focus groups than in one-on-one interviews. There are many types of research projects for which straightforward, direct questioning is going to provide more useful data. For instance, to understand the treatment algorithms that physicians use for patients with a specific medical disorder, or to assess which advertising concepts are more powerful, standard qualitative research is often more efficient and appropriate.

A wise researcher will know when to employ a projective technique - and will know which particular technique is going to produce the most useful output. Moreover, proper execution of these techniques is essential: if sloppily executed, projective techniques can be a waste of everybody's time and money. With these caveats in mind, however, artfully executed projective techniques can lead to a profound understanding of target audiences' perceptions and motivations and can provide considerably greater insight and clarity than traditional qualitative research. | Q

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