

Reinventing qualitative research

Belle Frank, Y&R, and **Anne Manning**, The Innovation Practice, LLC, explore new ways for consumers to help create relevant, new communications

THERE ARE MANY things we used to think were true that we are just not so sure about any more. And not just the obvious ones like the Tooth Fairy or Prince Charming. We used to believe market research offered effective ways to help marketers create and differentiate new products, services and communication platforms. But the research we use to help create ideas is not working – in fact it is killing our ideas. No wonder so much product innovation fails and marketing communication falls on deaf ears. The world is changing and we know it will always change. New products and services are coming to market more quickly.

New communication platforms are changing the way consumers access information, as well as how they make decisions. It would be absurd to deny the influence of digital channels, word-of-mouth, social networking or community in shaping people's perceptions and expectations. It's time to acknowledge the new reality: what we used to believe is not the whole truth. We need to find some new ways to work.

The problem

We are misusing research – particularly qualitative research. In fact, qualitative research, as it is applied today, is in need of reinvention.

We do not question the need to integrate consumer ideas and behaviours into our decision-making processes. We embrace it. The problem is in the construction of our research process, as well as how teams participate in the process. Fundamental elements of our common approach need to be adjusted if we want to launch truly creative ideas.

Reconsider the model

Science has taught us to step back and observe phenomena objectively in order to accurately describe and measure them without bias. Consistency and objectivity are central to the process. And in many environments, the need for a rigorous, meticulous, scientific approach is critical.

Medical research, for example, requires a deliberately objective and consistent

experimental design to effectively assess drug performance.

When it comes to developing new ideas, however, we believe we are often misled by the illusions of objectivity and consistency, and killing our best ideas by asking consumers to evaluate them too early in the process.

Creativity, by definition, is a process that requires both divergent (or imaginative, developmental) thinking and convergent (or analytical, evaluative) thinking. It requires input from a diverse group of people – and needs to challenge everyone involved to find new solutions in a proactive way. It relies on a facilitator, who is not a content expert, to provide opportunities for people to strengthen ideas, not kill them prematurely.

We believe we have not applied this approach to qualitative research because of three basic methodological illusions that get in the way of identifying the most creative solutions to our marketing challenges. These are:

1. the illusion of moderator objectivity
2. the illusion of the representative sample
3. the illusion of neutrality of stimulus and question flow.

The illusions are killing creativity

Typical industry practice reflects the belief that, in the name of research purity, the qualitative process needs to be as neutral, objective and consistent as possible.

What began as a desire to be objective and consistent has created a process that gets in the way of our ability to be clear-thinking and creative. Unfortunately, at its worst, this is tedious and inflexible; a misinterpretation of what we know about creative thinking and idea development.

Illusion #1: The moderator briefing must reflect our desire for objectivity

We hire a detached third party – the moderator – to facilitate the consumer dialogue. We expect this individual to manage the process objectively and so we inappropriately limit the information we

provide the moderator about our hypotheses and the project background. Then, at the end of the project, we expect our provider to switch roles, and move from an objective process person to a content expert, providing a synthesis of what the research has uncovered, a point of view on what it means and how the learning should be applied.

Prototypical case example: Superman Airlines

Apple Pie Advertising, a new hot shop, has been hired to develop a breakthrough marketing campaign for its client, Superman Airlines. Superman Airlines has developed a strong reputation for flying people to Florida quickly and cheaply. It has come up with a new way for people to 'fly themselves' (*à la* Superman).

The ad agency has gone through its internal strategy development process and has produced three concept boards that position this new way of travelling as: a) more personalised; b) faster; c) more convenient.

It recruits Superman's best customers, the people who fly, who spend money flying, who 'are not negative' about the brand.

It hires an objective moderator, who shows a neutral 'white board' concept statement, which describes the user, the offer and its benefits in very generic terms. He asks respondents to rate the concept – or vote for their favourite concept. He asks a generic set of questions: What is your reaction? What do you like? What do you not like? When respondents get to some area of confusion, he moves on.

At the end, after a significant investment in time and money, the moderator reports that consumers are concerned with pricing and safety, saying things like: 'What will it cost?'; 'Is it dangerous?'; 'I like to fly with a trained pilot, why would I want to fly myself?'; 'No meals ...'

The teams get discouraged ... and decide not to move forward with the idea.

Our question: Is there a better way?

Belle Frank is executive vice president, brand planning at Y&R. She leads cross-disciplinary strategic efforts for multiple clients. belle.frank@YR.com



Anne Manning has led qualitative research projects for clients in Fortune 500 businesses for 15 years. In her current capacity, she is helping drive innovation in companies by applying the principles of creative leadership. amanning@theinnovationpractice.com



Illusion #2: The sample must reflect our customer base

When we have early-stage creative ideas, our instincts say we should share them with the people they are designed to speak to or influence. We want the respondents in qualitative research to help us determine how to invest our time and money. We want to get feedback from them so we can make decisions that will help drive our business. We typically turn to our ‘core customer or prospect’— whose current needs and experience may limit their ability to contribute to the creative process.

Illusion #3: We must use a neutral stimulus and ask the same question consistently

When developing new ideas, the standard operating procedure is to ‘test’ white-card articulations of ideas or platforms first, decide which will work and then develop stimuli based on the response to the white cards. To do otherwise is considered ‘cheating’.

We worry that allowing the stimuli to be more creative, or closer to what people will actually experience when an idea is executed, will provide too many variables,

and create confusion and uncertainty about what people are really thinking and feeling.

When we are bound by these illusions, much of the value of qualitative research is eliminated. We limit ourselves to the questions and hypotheses we have developed, rather than allow ourselves to explore what may be real creative solutions.

In the end, the rational and the familiar will win – guaranteed. And the stronger, more unusual ideas will get killed (see Box on previous page).

Five steps to a better way

1. Collaborate for creativity

Include the moderator in early and in-depth discussions of the hypotheses. This needs to go beyond what we want to explore, to include an in-depth and open dialogue about what the ideas are supposed to accomplish, what we ‘wish’ to have happen, who is involved with the process, what obstacles we might encounter, what’s been tried, what are the concerns.

We need to articulate our hypotheses about how each idea is supposed to work, to explain its origins, what insights led us to believe it would work, who supports it, what our hopes, dreams, expectations, fears and insecurities are about it. That way, all issues are on the table – and can be dealt with in a collaborative way, to meet the goals of business success and creativity.

2. Go outside core customer groups and markets

If we want to develop new ideas, we need help from audiences who are open to new ideas. In the case of the new flying mode, it might be the top 0.1% of the flying public who agree with the statement ‘I love to fly for business’, or the drop-outs, the defectors, the non-flyers, the train-takers. Perhaps we should screen for innovators—those who have shown themselves to be more receptive to new ideas, who have tried one of our newer services.

If we are not creative about who we talk to, someone else will be. Consider

‘We used to believe market research offered effective ways to help marketers create and differentiate new products, services and communication platforms’

YellowTail wine. The product team approached beer drinkers, not wine drinkers, when they wanted to develop a new entry to the wine category. Why? Because beer drinkers do not drink wine for very specific reasons (it is too complicated, elitist, expensive). Digging into these barriers, and reframing the competitive set, allowed YellowTail to shape ideas that expanded the wine-drinking segment, while building a strong and successful brand.

We should learn a lesson from political pollsters and candidate handlers. They know it is the ‘undecided’ opinion they want to change, and when they work with candidates to establish platforms, they invite fringe audiences to talk to each other and then, like juries, reach alignment. If members of opposing fringe audiences can find common ground, they may have found a way to talk about an issue that will appeal to a much larger segment than either fringe audience’s POV alone could have.

3. Apply divergent and convergent questioning techniques

Recognising our ideas are young and tender, let’s ask respondents to build our ideas, not judge them. Using techniques those in the creative-thinking business have developed would help us learn more about the idea’s potential. By deferring judgement, using divergent thinking ▶

Techniques for encouraging Superman Airlines idea development

There are many ways to do this – each project will demand its own set of exercises. These are examples to consider.

1. Create a composite picture of what it would feel like to fly. How does our picture make you feel about this idea?
2. List all the ways this new way of flying might be helpful or beneficial to you.
3. What are the benefits of biking? Walking? Might any of these benefits apply to flying?
4. What is safety? What are some things in this world you think are safe? What are the characteristics of safe things? How can we apply these ideas to flying yourself? What are all the ways in which you could feel safe?

tools, engaging with a spirit of fun and openness, we can expand our thinking, to make sure our idea is both differentiating and relevant to consumers.

That way, at the end of a session, rather than having eliminated and removed what might be a novel, emotionally stirring idea for a new product or advertising campaign, we will have strengthened it and provided ourselves with direction about how to enrich it further (see Box on previous page).

4. Do not forget the environment

How can anyone sit in a hot, beige fluorescent-lit room for two hours, after working all day, and be expected to respond naturally – and positively? How can anyone sit in a dark room for four hours and be asked to think creatively?

Why not take a lesson from Richard Tait, the Grand Poo Bah of Cranium, Inc., the only company ever to receive three consecutive Toy Industry ‘Game of the Year’ awards. Eleven million games later, he speaks about his company’s ‘culture of innovation’ in which he changed rules and would not take ‘no’ for an answer. While developing games, Cranium staff spend hours at ‘play groups’ watching people play and talk about what they are playing. This is very different from what often happens in creative-development focus groups. We need to employ the equivalent of ‘play groups’ if we really want our respon-

dents to help us think. There are lots of ways to do this – we just need to agree to use one.

We can also take a lesson from ethnographers and start to think about how to create a natural environment for all concerned ... one conducive to the lively exchange of real points of view – among respondents, between respondents and clients, among clients.

5. Collaborate on the back-end

Much creative development work begins at the end of the research ... and it’s where collaboration among all the parties is most important. Do not simply ask the moderator to generate a report, which is then filed for posterity. Instead, ask the moderator to do what moderators do best – facilitate an open, in-depth discussion of the research experience to continue uncovering and gaining alignment around:

- ▶ the strengths of the ideas
- ▶ the potential of the ideas
- ▶ how to improve the ideas.

The report then becomes a summary of the debrief, and includes a clear statement of what *we*, as a team, see ourselves doing next and how *we*, as a team, intend to strengthen our ideas.

Creating a better way to create

Consumers can play a critical role in the development and nurturing of new platforms for communication and product/

‘If we are careful about how we work, disciplined in our process, and yet free to evolve our thinking as we go along, we will develop innovative strategies and winning creative work’

service development. In fact, the more inventive we want our platform to be, the more we need consumers to help shape it.

By definition, innovation is unfamiliar; it needs to challenge the status quo. So let’s challenge ourselves to identify new research methodologies that help us strengthen our most creative ideas. And if that means we have to think differently about process, experiment with new ideas, and find that our early concepts can be improved, then good. In the longer term, we will be more likely to succeed (see Box, left).

A strategy that ‘wins’ in research but can’t be executed is no strategy – it is just an abstraction. If we are careful about how we work, disciplined in our process, and yet free to evolve our thinking as we go along, we will develop innovative strategies and winning creative work.

If we change how we work, we will be able to collect true grit for the creation of unique and differentiating ideas – rather than a rational evaluation of a concept that simply identifies weakness. And the research will have served its purpose — to move us forward and allow us to soar to new creative heights. ■

Working differently

Current way	Improved way
Based on scientific process and applied marketing thinking from the 1950s	Based on latest research on applied creativity thinking
All about objectivity and consistency	All about strengthening ideas
Asks participants to evaluate and judge ideas	Asks participants to engage with and expand ideas
Honours consistency; shows same stimulus; asks the same questions	Honours change; stimulus and questions change as knowledge grows
Talks to mass audiences	Talks to specialised audiences
Concludes with ‘researcher’ writing a report independently	Concludes with team ‘debriefing’, sharing ideas and creating a team perspective/point of view of ‘where we go from here’

